

# GREEK COMMUNITY

## *Strategic Task Force Report*

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To: Eric Kaler, President  
Karen Hanson, Senior Vice President and Provost

From: Fred Friswold, Task Force Co-Chair  
Jerry Rinehart, Task Force Co-Chair

Date: December 16, 2012

Re: Task Force Summary Report



In March 2012, President Kaler announced the formation of a Greek Community Strategic Task Force (GCSTF) and issued a Charge to the GCSTF Steering Committee which emphasized the need to develop a “sustainable and robust relationship between the University and the Greek community.” The Charge asked the Task Force to prepare a report that addressed the following:

- An assessment and identification of resources and other issues needed to align the Greek community with the University’s mission, values and priorities.
- An analysis of the physical condition and capacity of the University’s Greek housing facilities with a focus on the fraternity system.
- An assessment of the options and barriers associated with facility improvement.
- Recommendations regarding the financial, political and other support needed to address existing facility needs.
- Discussion of the need and feasibility of expanding Greek residential capacity.

A “sustainable and robust relationship between the University and the Greek community” is clearly an important element in meeting the President’s goal of achieving “excellence in undergraduate education.” The U of M undergraduate Greek community is the largest organized student cohort with approximately 1,800 members. Its members assume many student leadership and service positions across the campus, and they maintain excellent GPA’s while graduating at higher rates than non-Greeks. Investing in this community is a sure strategy for enhancing the undergraduate living and learning experience at the University.

The GCSTF was organized into three Work Teams: Building Greek Student Community, Building the Alumni Community, and Housing and Facility Improvement. The first of the five elements in the charge is addressed in the reports of the Undergraduate Student Experience and Alumni Relations Work Teams. The remaining four areas are the focus of the Housing and Facility Improvement Work Team.

More than 40 students, alumni and University staff have worked together over the past six months to assess the current situation, develop recommendations, and outline a course of action that will help to make the recommendations a reality. As Co-Chairs we are pleased to share with you the enclosed final report and summary of the GCSTF work. We look forward to reviewing this information with you shortly.

The preparation of this report turned out to be a prodigious undertaking, requiring more discussion, research, analysis, and time commitment than we originally anticipated. We want to thank all who participated in the process from both the Greek and University sides of the table.

While completion of this report is a watershed event, we also recognize that this is just a beginning and that an even larger effort lies ahead. The hard work of assessment, prioritization, and implementation comes next, and this will require strong leadership from the University, broad and committed system-wide participation of Greek alumni, and collaborative efforts of both. The building of a future that includes a “sustainable and more robust Greek community” will require a focused collaborative effort among the three “legs of the stool”: Greek students, Greek alumni, and the University. We believe the Task Force work has created awareness of the momentum required to overcome the barriers of the past and move us toward a bright future for the Greek community. This will, however, be a marathon — not a sprint — and will require a deep commitment on the part of all.

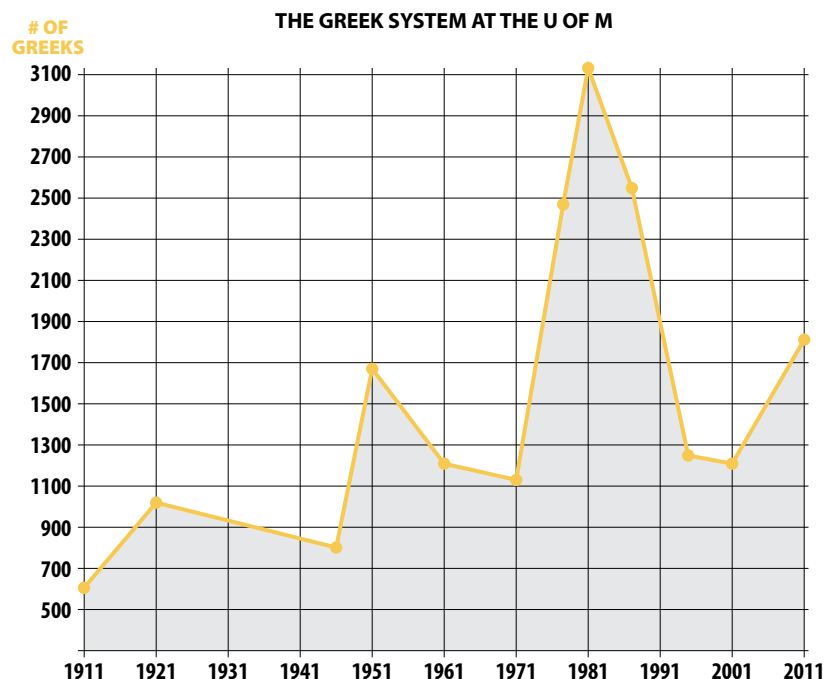
We look forward to working with you to achieve this common vision for a larger, more robust, and healthier Greek community and the benefits it will bring to the University and the students it serves.

## Introduction

For 138 years, the University of Minnesota (U of M) has created strong traditions with the Greek community. The first fraternity was chartered in 1874 and the first sorority was founded on campus in 1880. Over time, the Greek community has expanded and contracted, but it has always been at the center of student life on campus. The Greek houses shape the physical historic look of the U of M campus and provide a gateway through the main thoroughfare.



- Greeks at the U of M Twin Cities, like most campuses around the country, are providing a disproportionate share of campus leaders, are heavily engaged in student activities, enrich campus life, and are graduating at a better rate than the student body as a whole.
- Anecdotal data suggests Greek alumni are also disproportionately represented among donors to the University and persons of exceptional lifetime achievement in their chosen fields.
- This history strongly validates the expressed desire of President Kaler and Provost Hanson to have a stronger, more robust Greek community on the U of M Twin Cities campus.
- However, over the past 30 years the Greek community at the U of M experienced gradual attrition and lost more than 20 chapters and nearly 1400 members.
  - *U of M Greek participation peaked in 1981 at over 3,100 members.*
  - *Participation hit bottom in the early 2000's.*
  - *After modest recovery, Greek participation in 2011 totaled 1,795 [excluding Multi-cultural Greek Council (MGC)\*], down 44% from the peak.*



\* Appendix A – Glossary of Acronyms

\* Appendix B – MGC



- Accordingly, the Initiative of the President and Provost to form this Task Force to strengthen and grow the Greek community was timely, appropriate, and needed.

- Reasons for optimism:

- *System Improvement 2005-12.*

- Greek Partnership Statement signed in 2005.
    - Support for Greek life moved to Office of Student Affairs (OSA) Central Office in 2006.
    - 40% re-gain in membership between 2005-2011.

- *University executive leadership initiative establishing GCSTF.*

- *Growing recognition of the value of collaboration among students, Greek alumni, and University officials.*

- *Positive results from the formation of GCSTF are already in evidence.*

- Fall 2012 new agreement with First Year Programs office resulted in a 25% increase in women participation in sorority recruitment.
    - A smaller but still significant increase occurred in participation in fraternity rush.
    - Preliminary Fall Semester 2012 fraternity rush and sorority recruitment results indicate that at least 13% of incoming first year students pledged.
    - PHC voted on December 2, 2012, in favor of opening the U of M campus for extension.

- *Peer data suggests large unrealized potential. The Greek participation rate at the U of M last year of 6% of the undergraduate student body was at the bottom of the Big 10 and below that of most other peer institutions.*

				Big 10 Comparison		
2011	Enrollment	% Enrollment	Totals	IFC	PHC	MGC
University of Illinois	31,932	22%	7,019	3,384	3,428	207
Indiana University	32,543	17%	5,409	NA	NA	NA
Purdue University	30,776	17%	5,286	3,005	2,111	170
University of Michigan	27,407	18%	4,840	2,038	2,586	216
Penn State University	38,954	12%	4,687	2,619	1,932	136
University of Nebraska	19,345	18%	3,412	1,612	1,742	58
University of Wisconsin	28,918	11%	3,144	1,517	1,498	129
Michigan State University	36,058	9%	3,089	1,515	1,429	145
Ohio State University	42,916	7%	2,835	NA	NA	NA
University of Iowa	21,565	12%	2,553	1,008	1,457	88
Northwestern University	16,475	14%	2,262	1,021	1,147	94
University of Minnesota	30,610*	6%	1,856**	987	808	61

\* Appendix C – Student Enrollment Profile

\*\*Appendix D – Greek Chapter Roster

Appendix E – Greek Chapter Map

**All evidence points to significant unrealized potential for Greek community growth. The foundation for Greek community growth is based on 21st Century Value Proposition.**



As indicated, the benefits of a strong Greek Community to the University are clear. To attract more students to the system, however, the focus will need to be on the important values on which the system is predicated: academic excellence, campus and community leadership and service, and brotherhood/sisterhood. While the social benefits will continue to be prominent in the minds of some, the contribution of Greek life to the development of well-rounded, successful alumni and citizens is where the success of the community and the mission of the University are primarily aligned. The three constituencies of the Greek community: Undergraduate, Alumni and University of Minnesota faculty and staff must work together in partnership to achieve a robust and sustainable future for the system.

- **Task Force Goals**  
(See Appendix F — Growth models For Sororities and For Fraternities)
  - *Short-term: New pledges 10-15% of incoming freshmen body.*
  - *2018 goals: Greeks add >1000 members and grow from 6% to >9% of undergraduate student body.*
  - *Long-term Goal: Greeks at Big 10 median (currently 13% of undergrads).*
- **Measures of Success Re 2018 Goals:**
  - **Sororities:**
    - Successfully re-colonize and find housing for at least 4 new chapters.
    - Maintain average size (post recruitment) at >90.
    - Maintain house occupancy average at 95% or better.
    - Membership > 1350 (808 in 2011).
  - **Fraternities:**
    - Grow average size by >25% (40 currently). Set trajectory toward 60+.
    - Reduce empty beds (185 in 2011) and ultimately achieve average occupancy of 95% or better.
    - Successfully re-colonize and house 3 or more chapters.
    - Grow membership > 1400 (987 in 2011).

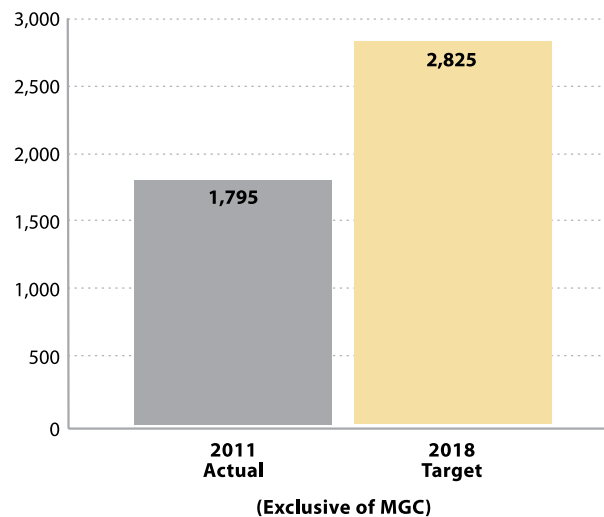


## Past barriers to success



- Students
  - Periodic behavioral issues damaging a chapter and tarnishing the image of Greek life.
  - Poor management skills and practices, lack of planning, lack of adult influence.
  - Poor upkeep of facilities and accumulating deferred maintenance.
  - Excessive attrition.
- Alumni
  - Laissez-faire attitude re student practices.
  - Lack of consistent, sustainable policies and plans for house corporations.
  - Lack of consistent, sustainable policies and plans at system-wide level.
  - Inability to speak with one voice to students and University.
  - Inability to follow through on system wide goals and plans.
- University
  - Relatively insular decision making style.
  - Compliance oriented attitude re Greek life and Greek practices.
  - Challenges of getting multiple departments on the same page re institution-wide goals.
  - Lack of record keeping on the Greek community at all levels.

**Greek Membership (Academic Year End)**



## Road to the Future

As noted above, the work of the GCSTF this year has brought together students, alumni, and University officials together in productive dialogue that has already brought measurable progress while rebuilding trust and building consensus on next steps.

Achievement of the goals outlined above will require institutionalization of a long-term, sustainable collaborative relationship between Greek student organizations, Greek alumni, and the U of M.

## Key Goals and Recommendations

### Student Community



IFC/PHC/MGC\* student leaders need to be actively included and engaged in establishing or modifying system-wide policies and practices affecting Greek life on campus — recruitment; orientation; adoption of best practices; behavior, ethical, and judicial matters; etc. They need to be:

- Treated as important and respected.
- Trained and led.
- Seriously engaged.
- Held accountable to high standards by their peers, by Greek alumni and by the U of M.

Below are the key recommendations for building the Greek Student Community on campus.

1. Enhance messaging about membership in the Greek community by focusing on the Greek “Value Proposition”.
2. Establish growth targets for the Greek community and necessary enhancements to the recruiting process to achieve these targets.
3. Develop programming for Greek members to insure consistent awareness of the responsibilities and privileges of Greek membership. Elements of this initiative should include the following:
  - a. A house staffing model that incorporates “live-in” adult presence to support and assist student leaders in maintaining housing and IFC policies, and ensuring member safety.
  - b. A required new member seminar.
  - c. A Fraternity and Sorority Community Ethics Board.
4. Improve operational performance of the Greek community by developing information systems and data tracking/monitoring to allow:
  - a. Better understanding of the Greek student experience and the development of both more effective programming to enhance the Greek living and learning experience and improved recruitment and training materials.
  - b. Improved membership reporting process and timeliness to allow better monitoring of the performance of the Greek community as a whole and to facilitate implementation of the Registration Hold system which is essential to the improved financial operation of the community.
5. Develop and implement the Greek Living/Learning Community in the 17th Avenue Residence Hall.
6. Provide the additional staffing and infrastructure resources required to move these recommendations forward.



## Greek Alumni

We believe the University is in a great position to enhance its alumni involvement in the Greek community. This includes enhancing the relationship with the students while they are on campus, before they graduate, and throughout their lives.

The Greek Alumni Work Team has identified several key areas in which we need to focus our efforts and energy. In the past, some work has been done in each of these areas, but our recommendations tried to include sustainable plans to help them become a permanent part of the Greek community at the U of M.

Listed below are the key Alumni Work Team recommendations in support of the Alumni role in strengthening the Greek community.



1. Establish a Greek Alumni Council (GAC) to give representation to Greek alumni in matters affecting Greek life at the University and to serve as an additional conduit between the University and Greek students. The GAC would interface with University in many ways and receive support from the Provost's Office.\*
2. Request that the University of Minnesota Alumni Association (UMAA) gather and have University of Minnesota Foundation (UMF) enter all Greek affiliation data in the Donor Management System (DMS). Develop an ongoing process to transfer records each year as students graduate.
3. Develop and fund a communication plan to communicate directly with Greek alumni.
4. Develop a written history of the Greek community at the University.
  - Find notable Greeks and use them for recruiting.
  - Celebrate the achievements of Greek students and alumni.
5. Create special events to engage and inspire Alumni.
  - a. *Greek Community Informational Reception & Meeting. This would be targeted to all advisors, house corporation boards and any alumni that are currently involved with the U of M Greek community.*
  - b. *100th Anniversary of Homecoming – All Greek Reunion. This second event will be designed to reunite several generations of Greek alumni during the 2014 Homecoming celebration.*
6. Strengthen Recruiting. Redesign fraternity and sorority recruitment to begin and finish prior to the beginning of Fall Semester 2013. Provide incoming student contact information to IFC and PHC for recruitment purposes. Develop recommendations using Fall 2012 results as a baseline.
  - a. *Office for Fraternity and Sorority Life (OFSL) should aggressively lead and pursue an application to U of M Panhellenic Council (PHC) to open for expansion by fall 2013.*
  - b. *Develop a plan to involve student athletes in the Greek community.*
  - c. *Additionally, a permanent recruiting office should be created in a high traffic area such as the 17th Avenue Residence Hall to provide exposure to new students.*
7. Provide 501(c)(3) support for chapter house capital improvements and undergraduate scholarship contributions through UMF.
  - a. *Conduct the additional due diligence needed to provide a comprehensive picture of the options available to U of M Greek Letter chapters in funding capital improvements and undergraduate scholarships in partnership with UMF, National fraternity and sorority organizations and other non-profits committed to growing the Greek community.*
  - b. *Implement the best solutions.*

\* See page 10 for more details



8. Provide detailed academic data to chapter alumni such as grades by chapters, by colleges, by year in school, etc. to help alumni determine how to improve academic outcomes.
  - a. *Track graduation rates by chapter.*
  - b. *Establish an academic oversight committee under the GAC to fulfill this function.*
9. Develop a Greek Alumni Mentor/Career Networking Program
  - a. *Create a system wide program for mentoring undergraduate Greeks by Greek alumni.*
  - b. *Invite Greek alumni to campus to share their experiences at a career seminar or event.*
  - c. *Connect Greek alumni as guest lecturers with the Living/Learning Program.*
10. Strengthen Chapter Governance and Alumni Volunteer Training
  - a. *Create and conduct local training to help house corporations and undergraduates understand fraternity and sorority operations.*
  - b. *Identify and implement Best Practices.*
11. Greek Job Board
  - a. *Create an online job posting system or create a Greek jobs section within the current system (Gold Pass) to help Greek alumni find undergraduate Greeks for internships and jobs.*
12. Identify and Recruit Greek Faculty and Staff
  - a. *Identify and recruit faculty and staff to help improve and grow the Greek community by participating on committees, mentoring, advising, etc.*
13. Engage Students Before They Graduate
  - a. *Create a program or series of classes and/or events to help undergraduates understand the benefits of being a University Greek alumni.*
  - b. *Work with UMAA and others to develop a program to explain the value proposition and create events to deliver the value proposition.*

## The University Community

Key recommendations regarding the University of Minnesota and affiliated organizations (i.e., UMAA, UMF) are as follows:



1. Provide continuing visible leadership and support to the Greek community from the Office of the President.
  2. Create a community-wide collaborative interface with IFC/PHC and GAC.
    - *Promote a collaborative approach to policy development and planning among University departments on issues affecting the Greek community.*
    - *Engage IFC/PHC and Greek alumni in developing campus-wide practices that minimize behavior issues and successfully implement the new Fraternity and Sorority Community Ethics Board as an effective self-regulatory body.*
    - *Organize staff and fund the Orientation and First Year Programs (OFYP) and Office for Fraternity and Sorority Life (OFSL) to adequately support the new Greek initiatives and the Greek community goals and objectives. This will require a minimum of one additional FTE in OFSL.*
    - *Provide a dedicated meeting and working space where Greek student leaders, Greek alumni leaders, and the University leadership and staff can collaboratively do their work.*
    - *Collaborate with Greek alumni and house corporations to create a funding mechanism for renovation and upgrading of existing Greek housing.*
    - *Collaborate with Greek alumni to develop a plan for the creation and funding of new capacity to support the anticipated growth of Greek membership (see below).*
- Through affiliates:
    - *Provide advice and counsel (and perhaps create one or more giving vehicles) re Greek fundraising for the advancement of chapter and system goals (UMF).*
    - *Complete and maintain a Greek participant database in DMS that is available to GAC and UMAA.*
    - *Create and staff a Greek affinity chapter that organizes and promotes appropriate Greek community-wide social events (UMAA).*
    - *Consider a house/land bank program to warehouse properties appropriate for Greek housing.*

**Greek Alumni Council — An action-oriented group of volunteers that will represent this important constituency in matters of importance to the University of Minnesota, Greek undergraduate members and Greek alumni.**



The GAC should be created and organized in a manner that achieves a sustainable governance model that is:

- Recognized as the official voice of the Greek alumni for the University.
- Organized to focus on the important issues affecting the short and long-term health of the Greek community:
  - *Recruitment, Marketing and Branding.*
  - *Student Safety and Event Management Practices.*
  - *System-wide Ethics, Standards, and Judicial issues.*
  - *Housing-quality and availability.*
  - *Zoning and community relations.*
  - *Leadership Development and Training.*
  - *Chapter House Operating and Financial Best Practices.*
  - *Greek Alumni Mentor/Career Networking.*
- Organized for good governance and sustainability:
  - *Board of Directors with fixed multi-year terms.*
  - *Board Officers with fixed terms and job descriptions.*
  - *Board Development committee to recruit participants on Board and Committees.*
  - *Operating and Strategic plans with annual and longer-term goals including those established by the GCSTF.*
  - *Accountable for deliverables and outcomes.*
  - *Publish an annual report as a communication to both the Greek community and the senior leadership of the University.*
- Able to optimize Urban Assets and Greek history:
  - *For many years the University suffered from its unique urban location — far different than most other Big 10 schools. As a commuter campus trying to do all things for all people, graduation rates were low and other student metrics were not closely monitored. In more recent years the University has turned its urban location into great strengths for the institution. It has taken advantage of our large and generous corporate community, created internships and fellowships, and developed mentoring, teaching, and service project opportunities for students in the inner city.*
  - *With a high concentration of successful and experienced alumni in the Twin Cities and their broad outreach into the community, there is great unrealized potential for the Greek alumni community in support of undergraduate members of Greek organizations.*

**Housing — The charge to the GCSTF by the President and Provost placed special emphasis on housing for good reason. The balance of this summary is devoted to this important aspect of Greek life.**



Aside from colleges and universities themselves, fraternities and sororities are the largest non-profit provider of student housing in the nation. They operate over \$3 billion of housing for more than 250,000 students. However, it has been recognized that a large portion of the nation's fraternity and sorority housing stock is old and in need of life safety equipment and other infrastructure improvements. The status on the U of M Twin Cities campus closely mirrors the national situation.

***Greek housing quality and capacity limitations at the U of M represent major barriers to the longer-term health of the Greek community and its ability to grow.***

- The current Greek housing stock at the U of M of approximately 1000 beds is generally 70-90 years old and in many cases is tired and outmoded. The quality, safety, and life expectancy of existing Greek housing needs to be upgraded.
- With sororities full and fraternities at 75% of capacity in 2011, significant new capacity will also be required to achieve our expanded system-wide Greek participation goals.

***Critical elements of future University/Greek alumni collaborative actions to deal with housing capacity include a number of sequential steps:***

- Upgrading of existing housing stock.
  - *The University approved funding for a forensic study of a representative sample of the existing fraternity and sorority housing stock which was commissioned by the GCSTF. The findings of the recently completed study, extrapolated to be system inclusive, indicates a funding need of \$13-20 million to upgrade the existing system-wide housing stock to be safe, code compliant, wired for current technology, and functionally and aesthetically competitive.*
  - *Greek house corporations generally have not been able to access cost effective funding sources to meet these needs, resulting in outmoded facilities and a buildup of deferred maintenance. Potential funding from local sources is limited in availability, expensive, and of too short duration.*
  - *Securing the physical well being of the existing 1000 beds in the Greek community is the most cost effective way to meet future Greek capacity needs.*

**RECOMMENDATION:**

**Create a task force comprised of U of M staff and Greek leaders to jointly develop a viable, low-cost, long-term vehicle to finance necessary improvements to insure that existing Greek housing facilities are safe, competitively equipped, and attractively presented and maintained.**



- Optimizing the opportunities represented in the new 17th Avenue Residence Hall.
  - The University has a new residential facility under construction on the block bounded by University and 4th Street and 17th and 18th Avenues. This six story facility is scheduled to open for the 2013 Fall Semester and will have 600 bed capacity and a dining facility open to both occupants and the general public.
  - This site had also been the chosen location of a 480 bed “Greek Village” proposed to be built by a non-profit entity (Community Student Housing, Inc., or “CSHI”) sponsored by a consortium of Greek organizations. While the University and the consortium jointly funded development of the proposal, in 2011 it ultimately failed to receive University approval.
  - The new 17th Avenue Residence Hall will double the number of undergraduate students living on “Fraternity Row”. This reality requires that the University and the Greek community work together in planning for potential student behavior challenges.
  - In recognition of the acknowledged need for more Greek housing capacity, the 17th Avenue Residence Hall design was modified to include two storefronts for new Greek organizations; another space was designated for Greek use; and 200 beds were to be made available for potential Greek use.
- While the 17th Avenue Residence Hall has some limitations in meeting Greek needs, University Housing has worked diligently with GCSTF representatives to achieve cost-effective solutions and maximize the utility of the spaces intended for Greek use.
- The 17th Avenue Residence Hall represents an exciting “first step” opportunity to advance the Greek community through increased bed capacity, incubator housing for two new chapters, and value-added programming.
- Optimizing the opportunity represented by the 17th Avenue Residence Hall will require successful collaboration of the University and Greek alumni on the following:
  - Attract new chapters to the “incubator” spaces.
  - Attract and locate freshman with a potential interest in Greek life to the 17th Avenue Residence Hall.
  - Develop meaningful Greek Life living/learning communities.
  - Utilize sleeping room capacity to meet additional capacity needs for Greek organizations.
  - Develop appropriate contract provisions for block allocation of beds to Greek organizations, with annual quantity adjustments as necessary.

Success in this endeavor can be a major stepping stone to the the first Greek Commons project.

## RECOMMENDATION:

Focused joint attention of both alumni and the University should be placed on optimizing the 17th Avenue Residence Hall opportunity since it is a key step in growing and strengthening the Greek system.



- Create New Capacity

It is well established that students who are in residence on the U of M campus do better than those that are not. We also know that Greek students graduate at a higher rate than non-Greeks. Thus it is strongly in the University's interest to retain existing Greek bed capacity and support new Greek housing. Historically, Housing and Residential Life (HRL) has appropriately focused on the needs of first year students and now has the capacity to house about 87% of incoming freshmen. Additional student bed capacity will come on-stream with the opening of the 17th Avenue Residence Hall in the fall of 2013.

It should be noted that the demand for on-campus housing for first-year students has increased significantly over the past 10 years. The increased first-year student housing demand has also resulted in higher upper-division student interest in remaining on or near campus. When the U of M was heavily populated by commuters, many chose to live at home (for free). However, students who start their educational careers living on campus do not typically move back home after the first year. This means that the majority of upper division students look for housing on or near the campus for the remainder of their educational experience. This has given rise in recent years to a huge increase in privately developed student housing in proximity to campus. It makes sense that the University also consider whether adequate on-campus housing capacity is available to meet the needs of other cohorts such as fraternities/sororities, transfer students and upper division students whose needs may be somewhat different than incoming first-year students.

Some growth in Greek membership can be achieved through increasing the non-resident component of membership. However, sororities and the larger fraternities are already pushing the practical size limits from the standpoint of both adequate meeting space and maintaining an intimate culture within the membership.

Some upper division students will move to privately owned apartments rather than University or fraternity housing for purely lifestyle reasons. However, to minimize Greek attrition it's important to keep a significant portion of upperclassmen housed together in a Greek complex rather than scattered across the campus in commercial rental facilities. Thus the anticipated and hoped for growth in Greek membership must be accompanied by a significant growth in Greek bed capacity.

New chapters attracted to (or back to) the U of M campus need not only bed capacity but also chapter facilities. Four national fraternities have started the recolonization process. We also have several chapters currently housed in rental housing which might be re-purposed to different use in the future. Thus, current Greek bed capacity will fall far short of meeting anticipated demand.



### Sources of additional capacity

#### Acquisition and renovation of existing buildings

With nearly two dozen Greek organizations having left the U of M campus over the years, there obviously are some former Greek buildings that could be returned to Greek chapter use. There are also other buildings that could potentially be acquired and repurposed to Greek use. This approach to capacity addition might be more suitable for sororities vs. fraternities since more of these structures are located in the 10th Ave./ Marcy-Holmes area than on Fraternity Row. However there are three major barriers to this approach to capacity building:

1. **Timing.** Existing buildings come to market periodically, but not necessarily when a Greek chapter is actively seeking a permanent home. In the mean time such buildings can get acquired by private developers for other purposes and be demolished or repurposed and thus get taken out of the potential supply of Greek housing.

2. **Cost and Suitability.** Like present Greek houses, most of the acquirable existing buildings are old and in need of significant renovation. The renovation cost issue is magnified by Historical Preservation status of both current Greek houses and potentially acquirable structures. Historic Preservation rules sometimes make needed facility improvements prohibitively expensive, encouraging inaction regarding deferred maintenance.

3. **Zoning Restrictions.** The City of Minneapolis has adopted restrictive zoning regulations that represent a potential barrier to repurposing a building to Greek chapter use.

The goals of both zoning regulations and historical preservation rules are laudable. Nearby residents want to protect their way of life and preservationists don't want to lose architectural features and structures of historical significance. Representatives of the Greek community are respectful of these values and want to be good neighbors whose presence can add value to the community.



#### RECOMMENDATION:

We believe the interests of all parties would be better served by collaborative efforts of the University and representatives of the Greek community in working with neighborhood groups and regulatory authorities to review and modify current rules for mutual benefit.

Acquiring and repurposing existing housing stock into Greek chapter use can be a partial solution to the capacity building need. However, limited supply and difficulty in matching periodic demand with periodic availability make this a relatively unpredictable and unreliable capacity source. In the meantime, we face the prospect of loss of potential housing locations through demolition or conversion to non-Greek uses.

#### RECOMMENDATION:

Greek alumni and the University should collaborate in assessing potential capacity addition through acquisition and, with University affiliates, consider the possibility of a housing/land bank plan to be implemented as suitable structures in the area become available for sale.



### ***Greek Commons Concept***

Nationally the traditional model of individual Greek houses with complete (and duplicative) facilities is giving way to the Greek Commons row-house concept in which each organization has its own distinctive spaces for gathering and chapter activities but share common spaces for dining, meetings, laundry and commissary operations and have a flexible bed capacity arrangement to minimize empty beds.



- The Greek Commons concept has many advantages over the traditional free-standing structure model for sororities and fraternities.
  - *Single commissary kitchen (or catering capacity) to serve multiple chapters vs. individual (money losing) food operations in each.*
  - *Large meeting and dining spaces to accommodate the needs of large chapter meetings (sororities and large fraternities have inadequate meeting spaces now to accommodate current membership).*
  - *Other shared spaces for non-distinctive functions like laundry, technology, storage, etc. to avoid duplicative facilities.*
  - *Flexible bed space to absorb the ebb and flow of individual chapter membership. Two models of flexible bed space could be considered:*
    - Sharing of bed capacity among Greek organizations only.
    - Sharing of bed capacity among Greek chapters as well as University housing (as will be the case with the 17th Avenue Residence Hall).
- *Sleeping accommodations in this type of facility usually target upper division students. Thus, a suite-style design will be more attractive to upper division students than a more traditional residence hall design that focuses on the needs of first-year students. Should a new Greek oriented facility be shared with HRL, the suite-style room design will be most suitable for transfer students, and upper division students.*
- The optimal structure, governance, and financial plan for such an entity will need to be explored collaboratively by the University and Greek community. On other campuses a variety of workable solutions have been implemented.
  - *Structural options include:*
    - Non-profit entity led and governed by Greek alumni leadership with the University as principal lender.
    - Non-profit entity with University as a partner in ownership and governance as well as serving as principal lender.
    - University owned/financed project with 99 year leases to house corporations.
  - *The structure needs to reflect a partnership between the parties to achieve mutual benefit and an appropriate sharing of risk and reward. A true collaboration is required to work through the complexities of a multi party project.*

### ***Greek Commons Funding Options***

- Under any of the structural operations it will likely be desirable and probably necessary for the University to be the principal source of debt financing for the following reasons:
  - *Complex ownership structure involving several entities as tenants and/or owners.*
  - *New entity with lack of operating history.*
  - *Local funding sources prefer short duration financing.*
  - *University has access to low cost, long term funding sources.*
  - *Consistent with other University financial commitments for student housing.*
- Any debt instrument should be soundly structured with the expectation of full return of the investment and full cost recovery of the cost of capital. Risk must be balanced with reward.



### **RECOMMENDATION:**

We suggest that a task force, comprised of Greek leaders and U of M staff, be established and charged with developing a plan and a recommendation regarding one or more Greek Commons projects.

### ***Location Planning***

Designation of space in the University space plan for future location of two or more Greek Commons developments is desirable to “hold” space until the development plans are ready to implement.

- Locations need to be identified for both sorority and fraternity housing:
  - *Fraternity Row (1500-1900 between 4th Street and University Avenue) should be reserved for Greek and other student housing.*
  - *Sorority Row-10th/University/Marcy-Holmes area may be most appropriate for sororities.*
- *Consideration should be given to:*
  - Securing a Greek Commons location, and/or
  - A housing/land bank plan implemented as suitable structures in the area become available for new chapter extensions.

Prompt development of an action plan for securing locations for expanded Greek housing should be implemented.

## Closing

The analysis and recommendations presented in the report of the Greek Community Strategic Task Force represent the collective work of more than 40 leaders from the alumni, University, and student communities. Identifying the issues and suggesting strategies and tactics for enhancing the Greek community are, in many ways, the easy part of this effort. The real work and test of the will of the three constituents groups to collaborate is ahead. Developing a plan for implementation of the recommendations is the next critical step. There is much at stake, and we stand together with the opportunity to re-engage alumni, align University resources, and galvanize students in a transformation of campus life unique in the history of undergraduate education on the Twin Cities campus.

The members of the Task Force have done outstanding work, and many appear willing to stay involved to insure effective transition and to provide continued leadership in these efforts.



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The balance of this report contains the findings, recommendations, and implementation steps from the three Work Teams: Building the Greek Student Community, Building the Alumni Community in Support of the Greek System and Examining Housing and Facilities Opportunities.

**Appendix A – Glossary of Acronyms**

<b>ASR</b>	Academic Support Resources
<b>ASTM</b>	American Society for Testing and Materials
<b>DMS</b>	Donor Management System
<b>FPA</b>	Fraternity Purchasing Association
<b>GAC</b>	Greek Alumni Council
<b>GCCWT</b>	Greek Campus Community Work Team
<b>GCSTF</b>	Greek Community Strategic Task Force
<b>HRL</b>	Housing and Residential Life
<b>IFC</b>	U of M Interfraternity Council
<b>MGC</b>	U of M Multicultural Greek Council
<b>NIC</b>	North-American Interfraternity Conference
<b>NPC</b>	National Panhellenic Council
<b>OFSL</b>	Office for Fraternity and Sorority Life
<b>OFYP</b>	Orientation & First Year Programs
<b>OGC</b>	Office of General Counsel
<b>OSA</b>	Office of Student Affairs
<b>PCA</b>	Property Condition Assessment
<b>PHC</b>	U of M Panhellenic Council
<b>RH</b>	Registration Hold Program
<b>RSO</b>	Registered Student Organizations
<b>UIFI</b>	Undergraduate Interfraternity Institute
<b>UMF</b>	University of Minnesota Foundation
<b>UMAA</b>	University of Minnesota Alumni Association

## Appendix B – MGC

The primary focus of the task force has been on issues relating to the traditional, social and predominantly white Greek organizations which customarily provide housing to a significant portion of their membership. At the University there are a number of Greek organizations whose members are primarily students from underrepresented groups. Many chapters have a longstanding history at the University, including one chapter that recently celebrated its 100th anniversary on campus.

Although these chapters have existed at the University for years, they have remained fairly independent of the University. It is only in recent years that an intentional effort has been made to support these chapters and their members. This support led to the creation of the Multicultural Greek Council (MGC) in 2010. Unlike IFC and PHC, which have a longer history at the University, this group is in the nascent stages and has a variety of unique challenges. It is imperative that the University continue to support them so that they can become robust organizations. Many of the MGC chapters have small memberships due to self-imposed restrictions on recruiting first-year students and the small number of minorities on campus from which to recruit.

For many reasons, these chapters do not always have the level of alumni support from a mentoring and financial perspective that is common with IFC and PHC chapters. One reason for lack of alumni support is that many of the alumni members moved to Minnesota after their undergraduate careers and therefore they are not connected to the University of Minnesota and their respective undergraduate chapters. Moreover, many of the members move away from Minnesota after graduating and lose the connection to the University and the local chapter. Housing needs are also different from IFC and PHC organizations; however, in recent years one of them rented a house on University Avenue, which is now being rented by an IFC fraternity. To ensure camaraderie, it is not uncommon for several members of a chapter to live in the same house.

Despite the challenges MGC chapters face, they are an important part of our Greek community, University, and broader communities. Their members are proud to be Greek and they have joined their respective organizations for many of the same reasons as those who joined IFC and PHC chapters. While many of the recommendations of the Task Force will not address all of their unique needs, these organizations will benefit from efforts to enhance the University's promotion of Greek life, educational and leadership programming, and alumni engagement. They will also benefit from the efforts to identify creative housing options for chapters which do not have a house, but would like their members to live together.

Due to the unique nature of these chapters and the important role they play in helping a diverse group of University students benefit from the Greek experience, we recommend that the Office for Student Affairs convene a group of undergraduates and alumni from the MGC chapters to identify ways that the University can help to strengthen these chapters, which will in turn lead to a larger and more diverse Greek community.

## Appendix C – Undergraduate Student Enrollment

**Campus:** Twin Cities  
**Level:** Undergraduate  
**College:** All

### Enrollment by Gender for Fall 2008 – 2012

Gender	2008	2009	2010	2011	2012
Male	13,435	14,339	14,671	14,869	14,916
Female	15,033	15,558	15,823	15,730	15,446
Unknown	37	24	25	11	13
Total	28,505	29,921	30,519	30,610	30,375

*Notes: Data for this category is self-reported. If the student did not select a gender, unknown is selected.*

**Campus:** Twin Cities  
**Level:** Undergraduate  
**College:** All

### New Freshman Enrollment by Gender for Fall 2008 – 2012

Gender	2008	2009	2010	2011	2012
Male	2,283	2,545	2,506	2,565	2,716
Female	2,823	2,855	2,817	2,803	2,798
Unknown	0	0	0	0	0
Total	5,106	5,400	5,323	5,368	5,514

*Notes: Data for this category is self-reported. If the student did not select a gender, unknown is selected.*

## Appendix D – Greek Chapter Roster

Fraternities	Address
Alpha Delta Phi	1725 University Ave
Alpha Epsilon Pi	1015 6th St SE
Alpha Gamma Rho	2060 Carter Ave (StP)
Alpha Tau Omega	1821 University Ave
Beta Theta Pi	1625 University Ave
Chi Psi	1515 University Ave
Delta Chi	1601 University Ave
Delta Kappa Epsilon	1711 University Ave
Delta Tau Delta	1717 University Ave
Delta Upsilon	1011 4th Street SE
Farmhouse Fraternity	1510 N. Cleveland (StP)
Kappa Sigma	315 19th Ave SE
Omega Nu Alpha	1019 University Ave
Phi Gamma Delta	1129 University Ave
Phi Kappa Psi	1609 University Ave
Phi Sigma Kappa	317 18th Ave SE
Pi Kappa Alpha	1813 University Ave
Sigma Alpha Epsilon	1815 University Ave
Sigma Alpha Mu	928 5th St SE
Sigma Chi	1615 University Ave
Sigma Chi	1623 University Ave
Sigma Nu	307 16th Ave SE
Sigma Phi Epsilon	400 10th Ave SE
Sigma Pi	1829 University Ave
Tau Kappa Epsilon (colony)	925 6th SE
Triangle Fraternity	521 12th Ave SE

Sororities	Address
Alpha Chi Omega	915 University Ave
Alpha Gamma Delta	401 11th Ave SE
Alpha Omicron Pi	1121 5th St SE
Alpha Phi	323 10th Ave SE
Alpha Sigma Kappa	Rental facility
Delta Gamma	1026 5th St SE
Gamma Phi Beta	311 10th Ave SE
Kappa Alpha Theta	1012 5th St SE
Kappa Kappa Gamma	329 10th Ave SE
Lambda Delta Phi	1381 N. Cleveland
Pi Beta Phi	1109 5th St SE

Chapters Without Properties	Affiliation
Alpha Epsilon Pi Fraternity	MGC*
Alpha Epsilon Phi Sorority	PHC
Alpha Kappa Alpha	MGC
Alpha Phi Alpha Fraternity	MGC
Beta Chi Theta Fraternity	MGC/IFC
Delta Lambda Phi Fraternity	MGC
Delta Sigma Theta Sorority	MGC
Kappa Alpha Psi Fraternity	MGC
Phi Beta Sigma Fraternity	MGC
Phi Delta Theta (colony)	IFC
Omega Psi Phi Fraternity	MGC
Sigma Alpha Mu Fraternity	MGC
Sigma Lambda Beta Fraternity	MGC
Sigma Lambda Gamma Sorority	MGC
Theta Chi Fraternity (colony)	IFC
Zeta Beta Tau (colony)	IFC
Zeta Phi Beta Sorority	MGC

\*MGC=Multicultural Greek Community





## Appendix F – Fraternity and Sorority Growth Models

Fraternity Growth Model – AY Ending Spring Semester								
	AY'12	AY'13	AY'14	AY'15	AY'16	AY'17	AY'18	%AY 2012
First Year Students	2716	2700	2700	2700	2700	2700	2700	
Pledges – Fall	193	249						
Pledges – Spring	95	100						
Pledges – Total	288	349	378	405	432	459	459	159%
% First Year Students	10.6%	12.9%	14.00%	15%	16%	17%	17%	
Fall Attrition		23%	22%	21%	20%	19%	19%	
Beginning Members		760	795	852	925	1014	1104	
Pledges		349	378	405	432	459	459	
F/S Attrition		-90	-95	-100	-105	-110	-115	
AYE Members	987	1019	1078	1156	1252	1363	1448	147%
Chapters	25	26	26	27	28	28	28	112%
Average (AYE)	39.5	39.2	41.5	42.8	44.7	48.7	51.7	
Male Undergraduate Body	14,869	14,916	14,900	14,900	14,900	14,900	14,900	
% Fraternity	6.6%	6.8%	7.2%	7.8%	8.4%	9.1%	9.7%	146%

Sorority Growth Model – AY Ending Spring Semester								
	AY'12	AY'13	AY'14	AY'15	AY'16	AY'17	AY'18	%AY 2012
First Year Students	2803	2798	2800	2800	2800	2800	2800	
Pledges – Fall	224	314						
Pledges – Spring	44	45						
Pledges – Total	268	359	378	392	420	448	448	167%
% First Year Students	9.6%	12.8%	13.5%	14.0%	15.0%	16.0%	16.0%	
Fall Attrition		23%	22%	21%	20%	19%	19%	
Beginning Members		622	695	772	852	945	1039	
Pledges		359	378	392	420	448	448	
F/S Attrition		-90	-95	-100	-105	-110	-110	
AYE Members	808	891	978	1064	1167	1283	1377	170%
Chapters	9	9	10	11	12	13	13	144%
Average (AYE)	89.8	99.0	97.8	96.8	97.2	98.7	105.9	
Female Undergraduate Body	15,730	15,446	15,500	15,500	15,500	15,500	15,500	
% Sorority	5.1%	5.8%	6.3%	6.9%	7.5%	8.3%	8.9%	173%

### Members '18 vs. '12

<b>Fraternities</b>	<b>461</b>
<b>Sororities</b>	<b>569</b>
<b>Total Increase</b>	<b>1030</b>

### Assumptions

1. Fall '12 beginning membership calculated per attrition formula
2. First year female students constant at 2800/year
3. Fall '12 initial pledges reported of 392 drop to 80% level by first semester report in December
4. Better recruiting and retention increases net new members from 12.6% to 16% of FY students
5. Annual attrition (from all sources including graduation and study abroad) declines gradually
6. Extension of one chapter per year.

*Note: Actual growth will be limited by practical limits on physical size of chapters and ability to achieve timely extensions*

# BUILDING STUDENT

BUILDING THE GREEK STUDENT COMMUNITY

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## *Work Team Report*

### **Steering Committee Member Liaisons—**

Doug Carlson  
Barb Farrell  
Bob McMaster\*  
Abdul Omari  
Angela Ugorets

### ***Staff:***

Steve Carnes\*

### **Work Team—**

#### ***Co-Chairs:***

Connie Sandler  
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Rachelle Hernandez\*  
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\* Denotes U of M Staff



## Introduction

The charge to the Greek Student Community Work Team identified a number of issues critical to the development of a sustainable and robust Greek community and campus including:

- Articulating the value proposition for student participation in the Greek community.
- Identifying growth targets for the Greek community and critical factors that must be addressed to achieve those targets.
- Developing programming for Greek members to insure consistent awareness of the responsibilities and privileges of Greek membership.
- Identifying University systems/processes both to.
  - support recruitment and retention.
  - to assist in the operational effectiveness of the Greek community.
- Exploring options within the 17th Avenue housing project and in existing on-campus housing to build and support Greek membership.
- Identifying additional means of supporting and encouraging student achievement and positive contributions to the overall campus community.



From the beginning of the Work Team's discussion, the critical role Greek alumni play in the health of the community was understood. Without alumni participation as equal and active partners with the University and the student membership, there is little likelihood that improvement can be made or that our goals can be achieved. The recommendations and initiatives identified in this section of the Task Force report, therefore, are built upon the assumption that recommendations included in the Greek Alumni Work Team report will move forward.

Below are the key recommendations for building the Greek Student Community on campus.

1. Enhance messaging about membership in the Greek community by focusing on the Greek "Value Proposition"
2. Establish growth targets for the Greek community and necessary enhancements to the recruiting process to achieve these targets.
3. Develop programming for Greek members to insure consistent awareness of the responsibilities and privileges of Greek membership. Elements of this initiative should include the following:
  - a. *A house staffing model that incorporates "live-in" adult presence to support and assist student leaders in maintaining housing and IFC policies, and ensuring member safety*
  - b. *A required new member seminar*
  - c. *A Greek Community Ethics Board*
4. Improve operational performance of the Greek community by developing information systems and data tracking/monitoring to allow:
  - a. *Better understanding of the Greek student experience and the development of both more effective programming to enhance the Greek living and learning experience and improved recruitment and training materials*
  - b. *Improved membership reporting process and timeliness to allow better monitoring of the performance of the Greek community as a whole and to facilitate implementation of the Registration Hold system which is essential to the improved financial operation of the community*
5. Develop and implement the Greek Living and Learning Community in the 17th Avenue Residence Hall.
6. Provide the additional staffing and infrastructure resources required to move these recommendations forward.

## Articulating the value proposition for student participation in the Greek community

### Current Situation

The value proposition for the Greek Campus experience rests upon four<sup>1</sup> pillars representative of the mission/values inherent in the Greek sorority/fraternity community. These include:

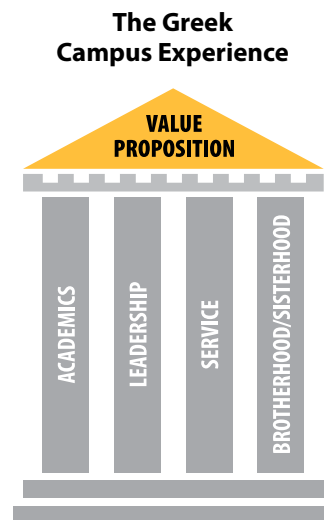
- Academics
- Leadership
- Service
- Brotherhood/Sisterhood

The social benefits of “brotherhood/sisterhood” are often the most visible to prospective members, and, indeed, for some students the primary reason for joining the community is access to parties and social life. Becoming part of a community who share similar interests and values does provide a foundation from which students can fully engage and thrive in the University environment. Friendships established within the community are often long lasting and life-changing. But over emphasis on social life and parties can attract the wrong type of individuals to the community and can produce high risk situations and incidents which damage the image of the entire community.

To leverage the full support of the University and remain relevant to higher education in the 21st century, the Greek community (with particular leadership from alumni) needs to re-assert the importance of the other three pillars — academics, leadership, and service. These are the areas in which the mission of the University and the goals of the Greek community truly align.

There is ample evidence to support the view that our Greek community is already aligned with these other key values:

- Academics: Greek students have GPAs that mirror or slightly exceed the overall undergraduate population, and their four year graduation rates are 12-14 percentage points higher.
- Leadership: Greek students provide leadership to dozens of other organizations on campus including major student government groups (e.g. MSA, Student Senate, Representatives to the Regents).
- Service: Greek students are key participants in important University activities such as Orientation and Welcome Week (e.g. while only 6% of the population, they typically constitute 25%-35% of student leaders in these program.)



1. A fifth pillar — “Health and Wellness” — has been identified as critical, but it has not been part of the traditional value set

**RECOMMENDATION:**

Continued and wide spread support for growth in the Greek community requires stronger emphasis on these areas in the promotion, recruitment, and education of new members. Greek alumni leaders (e.g. the Greek Alumni Council) need to work with the University to develop and convey messages that reinforce the broader benefits of participation, such as:

- Access to leadership opportunities and experiences which provide skills and understanding that enhance students' future success.
- Opportunities to develop and demonstrate accountability and responsibility (and other critical outcomes the University has articulated for students) through their participation in service and other campus or community based projects.
- Connections with alumni in various career fields locally, nationally, and internationally which can lead to internship and career opportunities.

We recommend stronger efforts to incorporate these messages in materials to incoming freshmen, in Orientation and Welcome Week brochures and seminars, on the University's website, in alumnae newsletters and similar communication efforts. Additionally, programming efforts should reinforce these findings so that the value of being a member of a Greek organization at the University is constantly enhanced.

Greek values have withstood the test of time on college campuses, and going forward it's crucial that what's "good" about the Greek community be pushed to the forefront at all times.

**Implementation Outline:**

- Engage Greek Alumni Council (GAC) in planning Greek elements of Fall 2013 Student Orientation and Welcome Week.
- Organize an active Greek Alumni Council (GAC) presence in development of Fall 2013 promotion materials in conjunction with IFC and PHC representatives.
- Expand Greek alumni presence in Fall 2013 recruitment planning.
- Organize a team to develop a Greek community value proposition that will reflect the four pillars. The team will include representatives from the University, IFC, PHC, and Greek alumni.

## Growing the U of M Greek Community

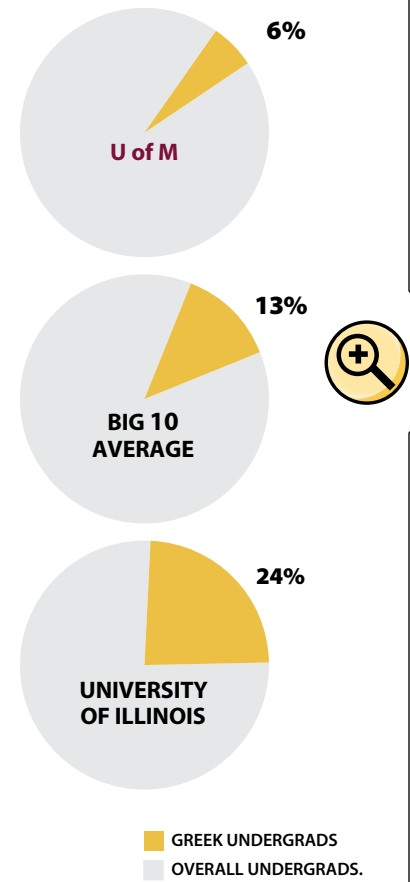
### Current Situation

With only 6% of U of M undergraduates participating in the Greek community, the University ranks at the very bottom of the Big 10. Illinois ranks at the top with 24% and, with the exception of Ohio State at 7% and Michigan State at 9%, the remainder of the schools have double digit participation with a median of about 13%. In the sixties, the U of M had 21 of the 26 National Panhellenic Council (NPC) groups on campus. Today only 10 remain. The number of North-American Interfraternity Conference (NIC) fraternities has also declined over the years. Greek participation peaked in 1981 at 3,129 or about 9% of the undergraduate student body. Greek participation in 2011 totaled 1,763<sup>2</sup>, down 44% from the peak.

Because it historically has been known as a “commuter campus” and because of its location in a major metropolitan area with many competing social and cultural outlets, the University has traditionally had a lower percentage of undergraduate students living on campus than other Big 10 schools. A significant change has occurred, however, in the number of students living on campus — currently 87% of the U’s freshmen live in University housing and a large percentage of all undergraduates live within a mile of the University. The University is clearly no longer a commuter campus, and this change should contribute to the efforts to increase participation in the Greek community.

The Work Team and the larger Task Force Steering Committee have discussed growth targets for the Greek community, and the consensus is that an intermediate-term goal (next five years) should be to have 9-10% of the undergraduate population participating in the Greek community, and over the longer-term to achieve a participation rate of 12%-13%. The differences between the sorority and the fraternity systems, however, require different approaches to these targets.

**With only 6% of U of M undergraduates participating in the Greek community, the University ranks at the very bottom of the Big 10.**



2. Excluding members of the Multicultural Greek Council groups

**Sororities:** The number of women interested in joining a U of M sorority has grown steadily the past few years (Appendix A). Indicative of the capacity for growth, modest changes in recruitment in Fall 2012 resulted in almost 200 more women participating in recruitment than last year. Existing chapters are at house occupancy capacity and cannot begin to accommodate the number of women who signed up for formal recruitment, let alone other women who had hoped to join a sorority at some point in their college career. Because the NPC tightly controls sorority expansion, the University has only limited ability to respond to this demand for sorority membership in a timely manner.

The campus PHC members have voted in favor of opening the U of M for sorority extension.\* Except for Alpha Epsilon Phi's re-colonization in 2007, this is the first time is the first time in 30 years that the U of M has been able to open for a formal extension process. It appears likely that prospective sororities will be visiting the campus in early 2013 and the first new sorority will be selected to colonize/recolonize in early spring. Ideally, the new group will choose its first new member class during spring semester and participate in formal recruitment as tenants in the new 17th Avenue Residence Hall in Fall 2013. Over the subsequent five years, three additional sororities should be added to campus to achieve the target of 9% participation among women. Additional new sororities beyond the intermediate goal of four new chapters would be required to achieve the longer term goal of reaching the median Greek participation rate in the Big 10 of about 13%. This would require some combination of the following:

- Identification of residential property for possible purchase contiguous to current sorority houses.
- Modification of the sorority housing model to include a portion of bed capacity to be in a Residential Hall facility.
- Development of a Greek Commons facility with some shared spaces for chapter tenants and larger meeting/dining spaces available to the PHC system.

Solving the housing capacity problem is a critical element in achieving the goals for a more significant and more robust sorority system.

**Fraternities:** Unlike sororities on the U of M campus, fraternities currently have capacity for expanding membership both as live-in and as community residents. With memberships ranging from under 15 to nearly 100, and an average membership of 40, a significant element in growing the fraternity system will be achieving more comparable membership numbers across all 24 chapters, with an ultimate goal of 60 or more members per chapter. Expanding the number of fraternities on campus is the second element in achieving the desired growth in Greek participation. Again, unlike sororities, fraternity expansion is controlled at the national level for each chapter and there is no overall structure governing the addition of a chapter to a campus.\*



\* Appendix A – Minnesota Daily Sorority Article, November 8, 2012

\*\*Appendix B – Minnesota Daily Fraternity Article, December 4, 2012



To achieve the growth goals in both the sorority and the fraternity system, more effective means of reaching prospective members and more impactful messages need to be developed. In fall 2012, a fraternity formal rush/recruitment was launched towards the end of the Welcome Week and prior to the start of classes — a first in many years — and while the limited number of days was not enough to complete the rush process and deliver bids — it was successful in introducing hundreds of young men to fraternities. An issue to be addressed, however, is that a large percentage of Welcome Week leaders are themselves Greek, and their participation is crucial to the operation of the new student week of activities.

The feasibility of moving sorority recruitment and a formal men's recruitment process prior to the start of fall classes should be explored. There are benefits to completing recruitment prior to the start of the semester, but there are also a number of drawbacks and complications. These include students returning to campus earlier than usual, the need for housing for potential new members, developing a partnership with OFYP to ensure they don't lose their Welcome Week leaders and other issues.

#### RECOMMENDATION:

- Because of the positive contributions of a strong and vibrant Greek community to the University undergraduate experience, the University should seek to expand participation in the Greek community to 9% in the intermediate-term (over the next five years) and 12-13% over the long-term.
- To assist in achieving these goals, efforts should continue toward moving sorority and fraternity formal recruitment prior to the start of the fall semester.



#### Implementation Outline

- Share GCSTF Growth Model broadly with Greek alumni from every current chapter and identify how individual chapters can support the short/intermediate/longer term plans.
- Engage the Greek Alumni Council to support the development of more effective recruitment processes, including the possibility of a pre-Welcome Week recruitment event/conference.
- Initiate and coordinate efforts to work with city planning and zoning officials to address the current restraints on the development/redevelopment of Greek housing.



## **Develop programming for Greek members to insure consistent awareness of the responsibilities and privileges of Greek membership.**

### *Current Situation*

Students in the Greek community are a microcosm of the University's undergraduate population, and the behavioral and other challenges that face them are evident among undergraduates across the country. The special status the Greeks claim for the community, however (i.e. that they are values-driven organizations whose goals are directly aligned with the University's educational mission), brings with it both higher expectations and higher visibility than the broader undergraduate community.

Failure to adequately address behavioral issues within the Greek community puts our students at risk and continues to reinforce negative stereotypes that negate the positive aspects of Greek life. Greek alumni leadership recognizes that such failures:

- Create risk management challenges for house corporations.
- Adversely impact housing corporations' financial stability.
- Create obstacles to recruitment of the best students.
- Damage potential alumni support.

On the Twin Cities campus, efforts to help Greek participants understand and meet these expectations include a variety of special training and development programs.

- The Office for Fraternity and Sorority Life (OFSL) sponsors community-wide leadership development programs such as UIFL, the Emerging Greek Leaders Program, and Bystander Training.
- Individual chapters offer educational programs, often mandated by their national headquarters, on topics such as alcohol abuse, sexual assault prevention, and risk management.
- The community leadership councils — IFC/PHC/MGC — organize new member seminars and collaborate on bringing special speakers to the campus. These programs almost always focus on responsible behavior and decision making.

Among the efforts to address alcohol-related behavioral issues (in addition to the training programs mentioned above) are the creation of a Greek-focused version of an on-line, one credit course called "Alcohol and College Life." In addition, some national headquarters require that their members complete an on-line alcohol education course (e.g. AlcoholEDU<sup>3</sup>). Most recently, to help monitor alcohol access and student safety at social functions, a peer monitoring program (Arkeo) was established to observe fraternity parties and check for compliance with IFC policies.

Nevertheless, behavioral issues continue to pose significant challenges for those seeking to grow and enhance the Greek community. While underage and high-risk drinking are national problems on college campuses, the Greek community is particularly susceptible to damaging incidents. Although the vast majority of Greeks at our campus are legally underage, most fraternities do allow alcohol at chapter functions. Given the emphasis on social bonding, it is not surprising that national surveys and University of Minnesota surveys consistently indicate that Greeks have a statistically higher rate of high risk drinking than non-Greeks. Sororities are not insulated from these issues. While the adverse events may happen on fraternity premises, they can put sorority members at risk and damage the overall Greek image. Consequently, sororities should collaborate on steps toward their prevention.<sup>4</sup>

3. The University is currently considering incorporating AlcoholEDU or a similar on-line training program in the pre-matriculation activities all new students are expected to complete prior to coming to campus. It is possible that the Greek version of this program could be made available to the entire Greek community as part of the University's overall contract

4. Since alcohol is not permitted in sorority houses, fraternities generally assume all of the risk for social events. Sororities are generally are not held accountable when policies are violated at events that they attend. There is hesitancy among the fraternities to enforce existing risk management policies out of fear that their events will be less attractive to sorority members.



Clearly, there is no single approach that will eliminate all the problems associated with underage and high risk drinking. Generally, however, it seems clear that chapters with a number of actively involved alumni tend to do better behaviorally than those with few or no alumni supporters.<sup>5</sup>

While all chapters agree to follow risk management procedures established by their national headquarters and/or the IFC/PHC leadership groups, it is often difficult for student leaders alone to effectively exert control over their chapter peers to insure these policies are adhered to. These issues are exacerbated by the efforts of non-Greek students to gain access to Greek hosted parties. This problem may be compounded with the opening of the new 17th Avenue Residence Hall Fall Semester 2013. Whether these students bring their own alcohol or seek access to it from their friends, they are often attracted to the fraternities because they realize that the behavioral monitoring at a Greek party is much less restrictive than it is in their University residence halls.

It is noted that one of the major changes in University housing policies over the past two decades designed to address behavioral issues has been the incorporation of live-in professional staff. Greek sororities already incorporate live-in adult staff, and this, in conjunction with their national headquarters mandate that all sororities will be alcohol free, essentially eliminate alcohol-related behavioral problems within their chapter facilities.

Finally, the process for responding to conduct problems needs to be modified to allow more proactive and timely responses. Disciplinary issues involving Greek organizations are currently handled in a variety of ways at the University. Depending on the nature of the incident or behavior of concern, the University, a governing council, a local chapter and/or their headquarters may be involved in responding to the incident, investigating what happened, and assigning consequences as appropriate. (See Appendix C)\*

The University adjudicates relatively few Student Conduct Code violations involving Greek organizations. In most instances the cases involve violations of laws related to alcohol, although occasionally there have been cases involving hazing. Within the past five years, no Greek organization has been removed from campus by the University, although several have been placed on probation or suspended for various periods of time.

While some disciplinary issues involve Student Conduct Code violations, other incidents may be violations of IFC/PHC/MGC or national headquarter's policies. IFC sanctions can include limits on social activity, as well as fines, education, and community service requirements. Headquarters may limit a chapter's social activity, prohibit alcohol on chapter premises or at chapter sponsored events, and/or require educational programming. Headquarters can also decide to suspend a chapter or remove them entirely from campus. There is currently no training for IFC judicial board members. At the chapter level training for those responding to judicial issues is typically done by other members or alumni at the local or international level. Not surprisingly, the undergraduate councils, on a recurring basis, have found it challenging to hold their peer organizations or individuals accountable for violations.

Perceptions can be changed, but the persistence of negative behaviors makes changing those perceptions very difficult. Clearly, fraternity and sorority house corporations and other alumni are united with University staff in their abiding interest in reducing adverse behavioral incidents and maintaining high standards of student conduct.



\* *Appendix C – Student Behavior Judicial Overview, Ethics Board*

5 Adjudication of incidents in chapters where there is strong alumni participation tends to be more effective and can require less severe sanctions

**RECOMMENDATION:**

The following recommendations are dependent upon the effective collaboration of alumni, University staff, and Greek student leaders.

- Working with chapter leaders and alumni, fraternities should invest in **adult live-in staff** to assist student leaders in maintaining safe and respectful living environments. The University has indicated its willingness to provide training for these staff to provide them with skills and information comparable to that received by professional and student staff working for Housing and Residential Life. Chapter housing corporations or comparable entities for each chapter should play a key role in supporting the live-in staff, making sure that resources are available and that chapter policies reinforce behavioral expectations.
- **A new member seminar** focused on both instilling the values and ideals of the Greek community and addressing developmental and behavioral expectations should be developed as a required component of Greek community membership. Community-wide live-in staff and appropriate Greek alumni could be active facilitator/participants in these sessions.
- Through the new member seminar or other means, all new members of the Greek community should complete an **alcohol education program** (e.g. "AlcoholEDU," "Alcohol and College Life.") Presented in modular and or sequential fashion, the seminar should include both required core and optional segments to allow students to shape their training program according to their individual interests and needs.
- Advisors for the sorority system need to be engaged in discussion of the **roles that sororities play in the overall risk management scenarios** that are presented to the Greek community. OFSL and the alumnae community must take an active role in mitigating risk as it relates to behaviors coming from our sorority membership.
- The University should move forward with the plan to implement a **Fraternity and Sorority Community Ethics Board\*** to enable the OFSL Program Director and undergraduate chapter members to be more effectively involved in responding to Conduct Code violations.\* This effort should reinforce community values and expectations regarding the behavior of Greek organizations and individuals. FSL will need to work closely with the Office for Student Conduct and Academic Integrity to ensure consistency in treatment of Greek organizations and other student organizations. To increase transparency and enhance accountability, IFC and PHC should share the results of disciplinary actions involving their respective chapters. A representative from the Greek Alumni Council should serve as a liaison to the Fraternity and Sorority Ethics Community Board and work closely with chapter advisors and house corporations to ensure that IFC and PHC chapters understand their roles and responsibilities.



\* Appendix D – MN Daily article, September 12, 2012

## Implementation Outline

- Working with housing corporations and chapter alumni, the Greek Alumni Council should provide leadership for establishing adult, live-in staff within the fraternity system.
- The OFSL and the Greek Alumni Council should assemble a team of students, Greek alumni, and staff to identify additional means of supporting/encouraging student achievement and positive contributions to the overall campus community.
- Using the 2011 Strategic Plan\*<sup>6</sup> as a resource, the Greek Alumni Council should identify, recommend and help implement “best practices” improvements to existing leadership programming and help secure increased or reallocated funding to support this important area of programming.

## Improve Greek community operating effectiveness by designing and implementing new/upgraded systems to track and monitor performance

### Current Situation

The University routinely tracks academic performance, and retention/graduation rates for fraternity and sorority members. Additional information about the Greek community, e.g. gender and racial demographics, majors and college of enrollment, financial aid eligibility, and home state or country are also available but have not routinely been tracked. Although the University conducts Greek community surveys periodically, it lacks consistent data about the overall Greek student experience. Many regular University surveys, e.g. those conducted by Boynton Health Service and Recreational Sports, specifically ask students whether they are Greek, but there are typically not enough Greek respondents to determine if there are statistical differences between Greeks and other undergraduates.

Tracking basic student membership is an important element of Greek community financial stability. Historically, unpaid rents and membership dues have resulted in challenging operational environments for many chapters. Recently, the Office for Student Affairs (OSA), Academic Support Resources (ASR) and the Office of General Counsel (OGC) have worked closely with Fraternity Purchasing Association (FPA)<sup>7</sup> to develop a program which would help to improve member Accounts Receivable (A/R) collections and reduce bad debt expense.



### \* Appendix E – 2011-2014 U of M Greek Strategic Plan

6 The 2011 Strategic Plan for the Greek community identified a multitude of “best practices” and other tactical approaches to enhancing Greek life on campus. [See Appendix B for additional information]

7. FPA, a registered student organization, is a co-op buying association founded in 1939 owned and operated by U of M residential student organizations. There are currently 51 FPA member organizations, 21 of which use FPA Billing Services

**RECOMMENDATION:**

- **Develop a more comprehensive, data-rich means of evaluating the Greek student experience.** Additional tracking criteria need to be identified and added (e.g. participation in study abroad programs, undergraduate research, leadership roles, etc). Results should be tabulated annually and used to both promote and improve the Greek community.
- To achieve the above recommendation, **the University must work with the Registrar and Office for Information Technology** to enhance its capability to track Greek involvement and the Greek student experience. (This tracking effort should be integrated with the system developed to track graduates and alumni referenced in the Alumni section of this report.)
- Implement a **Greek Life survey to be conduct at least bi-annually** to gauge the students' perspective on the value/benefits of Greek life.
- Move forward with the **new FPA Registration Hold (RH) program.** This system will require students to be current with their financial obligations in order to register for upcoming academic terms. Greek students with a balance of more than \$200 that is 60 days past due will not be able to register until their account is paid.

**Implementation Outline**

- Organize a Team representing IFC, PHC, MGC, Greek alumni, Office of Undergraduate Education and OFSL to develop plans for a comprehensive Greek community engagement data base.
- Develop a periodic reporting system that allows key constituents to assess the experience of the Greek student community and develop programming to support their long term engagement and success.

**More specifically**

- *Develop an effective communications plan for the Registration Hold system that ensures participating chapter compliance with all deadlines for Fall 2013 class registration. Since the Registration Holds must be placed at least six weeks prior to the opening of the upcoming registration period, chapters need to be prompt in providing information to OSA and FPA regarding their current membership.<sup>8</sup> FPA, OFSL, house corporations, alumni advisers and undergraduate leaders need to work together to ensure that all required information is received on time for Fall 2013 class registration.*

8. Because of document distribution and collection delays, participating chapters were unable to provide the required information to FPA prior to the September 28, 2012 deadline ; consequently, the new system will not be in place for Spring 2013 class registration as originally planned.

## Exploring options with the 17th Avenue Residence Hall and other University on-campus housing to build/support/strengthen Greek membership

### Current Situation

Living/Learning Communities in residence halls on the U of M Campus allow students with specific interests to live in a contiguous space and participate in special programming related to their interest areas. As part of the effort to support growth and interest in the Greek community, the University has agreed that up to 200 beds would be available for members of the Greek community within the new 17th Avenue Residence Hall when it opens in Fall 2013. As part of this commitment, the potential exists for a Greek Living/Learning Community for new students interested in the Greek community, but not yet committed or decided about joining. No formal efforts have been taken toward engaging new students living in other facilities in activities or programming related to participation in the Greek community.

In addition, two “store front” chapter spaces have been incorporated to provide transitional or start up space for Greek chapters seeking to expand or re-colonize on campus. Architecturally, these chapter fronts along University Avenue blend superbly with the styles of the adjacent facilities along “fraternity row.” A third, multi-purpose space is also available for possible support of Greek community activities. Efforts are underway to identify organizations interested in leasing these spaces.



### RECOMMENDATION:

- The OFSL should proceed with efforts to identify programming and other options for students opting to live in the Greek Living/Learning community. The availability of this new Living/Learning Community should be promoted in all new student materials beginning with admission for the class of 2017. Students interested in a Greek experience should be encouraged to consider the new residence hall — citing a shared interest/expectation for going Greek.
- The Greek alumni and leadership of IFC, PHC and MGC should have input as to the language used to promote the new Living/Learning Community. Parameters for the community must be developed to include tutorial on the Greek community in general, specific information about the Greek opportunities on the U of M campus and most importantly, the procedures for going Greek.
- Students electing the new community should be provided with Greek mentors that can guide them and advise them prior to their arrival on campus. Provisions for those students who decide against joining the Greek community or are not offered a bid to a Greek group must be determined. Because this will be a new, unique University community, the University and Greek community must continuously monitor and assess the successes or failures. Inter-Greek programming must be developed to encompass all students.
- OFSL should proceed with communication/marketing efforts regarding the availability of the dedicated chapter space available in the two store fronts in the facility. Both chapters spaces should be filled by Fall 2013.



## Implementation Outline

- Engage HRL, IFC, PHC, MGC, OFSL and the GAC in 17th Avenue Residence Hall program planning.
- Engage HRL, IFC, PHC, OFSL and “Fraternity Row” neighbors in identifying the unique challenges of a significant freshman cohort living in University Housing within two blocks of several fraternities and developing a partnership to proactively manage this new reality.
- It appears a lease for one chapter space is pending, and OFSL and HRL should continue consultation with other groups interested in the remaining chapter space.
- As indicated below, consideration of possible uses for the multi-purpose space within the facility should continue.

## Identify the additional staffing and infrastructure resources needed to move these recommendations forward

### *Current Situation*

**Staffing:** The Office for Fraternity and Sorority Life currently consists of a full-time Program Director, two graduate assistants who work for a combined total of up to 40 hours a week and a student office assistant. Funding to support OFSL’s student workers (including the graduate assistants) and programming for the Greek community is provided through discretionary funds within the Office for Student Affairs. Within the Big Ten, staffing models for Greek life vary, but it is most common to have at least two professional staff (i.e., a director and an assistant/associate director or coordinator). There are also alternative funding models for these positions which include institutional support, as well as support from the respective leadership councils, a membership fee, and/or foundation support.

Given the intent to increase the size of the Greek community and the need to implement a number of recommendations that will stem from this report, there is a need for additional staff for OSFL.

**Space:** None of the three leadership councils (IFC, MGC, PHC) have a dedicated office on campus to use for meetings, storing materials, hosting and preparing for events (e.g., sorority recruitment) or to host individuals seeking information about their respective chapters. IFC and PHC had office space in the past, but due to leadership challenges it was lost several years ago. MGC has never had an office. The leaders of the three councils have indicated that they would benefit from having dedicated office space for their respective groups. It would provide many benefits, including increased opportunities for collaboration, more convenient meetings, and an identifiable place where the Greek community’s leaders could be found.

The Fraternity Purchasing Association (FPA) provides critical financial and managerial support for the majority of Greek student organizations (as well as several other student organizations, including Hillel). It also provides needed continuity to the Greek community which inevitably has regular turnover of student and alumni leaders. Although it has been located on campus for most of its history since 1939, in recent years it has had to move several times. Joint efforts of U of M staff and GCSTF members were successful in securing “on campus” space for FPA at 2221 University Ave. SE. This facility is a U of M owned and operated building. FPA was able to negotiate a three-year lease at attractive rates.



**RECOMMENDATION:**

- If the important recommendations in the Greek Community Strategic Task Force are to move forward, it will be necessary to **add resources to OFSL**. Doubling the size of the community, adding a required new member seminar and other programming to address safety and behavioral concerns, and developing an effective Greek Alumni Council, will all require major support and leadership from OFSL. Funding should be identified to hire at least one additional full time staff and to increase the graduate assistant support for OFSL. Additional consultants may also be necessary to work on a project basis to help launch the new initiatives put forth by the Greek Task Force. As well as seeking additional funding from the University to support these investments in OFSL, alternative/additional funding sources should be pursued (e.g. adding a user fee to all Greek members, implementing a development campaign to endow positions).
- Find office space for the Greek leadership councils. The possibility of allowing IFC/PHC access to the small chapter space in the 17th Avenue Residence Hall should be evaluated, including the feasibility of “multi-purpose” use.

**Implementation Outline**

- OFSL and HRL should continue working with Greek alumni on small chapter space planning.



## Appendix A – MN Daily Sorority Article

# MINNESOTA DAILY

NEWS [1] » CAMPUS [2]

## Panhellenic Council considers adding new sororities

**If approved, a chapter could be on campus by fall 2013.**

By **Samantha Alisankus** [3] November 08, 2012 (4 weeks ago)

The University of Minnesota's Panhellenic Council began discussions this fall regarding the addition of a new sorority to campus. Members hope to have the new chapter on campus by fall 2013.

Undergraduate sorority members and alumni formed an extension exploratory committee in late September to consider adding new sororities to the University's greek community.

Cari Wikman, the committee chair, said overwhelming chapter size, limited housing and increased interest in campus greek life prompted the committee's formation.

Many sororities are not able to offer housing to all interested members and some have been forced to outsource events to locations that can better accommodate the large chapter size, she said.

Inviting a new sorority to campus could help alleviate the pressure of rising membership and also offer sorority members a more intimate sorority experience, Wickman said.

"We want to make sure that the girls who are going through and joining the greek community are having a really great experience," she said, "and ... that they have the ability to get to know their sisters on a one-on-one basis."

The University's greek community is one of the smallest in the Big Ten.

Wikman said the committee is looking at how other schools' greek communities function and thrive. She said she believes there's a "huge opportunity" to expand the University's community to be the same size as other peer institutions.

The committee is expected to present a final report detailing the benefits and obstacles of expansion to the PHC on Dec. 2. The PHC community will then look over the report and vote on whether to move forward with extension.

## Appendix A – *continued*

If the PHC votes in favor of extension, the report will be presented to the National Panhellenic Conference, which will either approve or deny the committee's request for extension.

Both Wikman and PHC President Angela Ugorets said they're confident that if the University's PHC votes in favor of extension, the NPC will grant the request.

If approved, PHC will form an extension committee in December to generate criteria and review information sent by interested sororities. It will then make recommendations to the council regarding which national sororities to invite to campus.

Matt Levine, program director for the Office for Fraternity and Sorority Life, said the extension process can take one of two forms — inviting only returning sororities back to campus or allowing any NPC sorority to request consideration from the committee.

Levine said he "has asked the [exploratory] committee to consider all options" and look into requests from non-returning sororities.

But Wikman said that decision can only be made after the extension exploratory committee receives NPC approval.

"Both are very viable options," she said.

The committee anticipates beginning interviews with interested sororities this spring and having a new chapter on campus by fall 2013.

"The goal of our committee is to bring a chapter to campus," Wikman said. "But the end goal [of the extension process] is really making sure that that chapter is able to establish roots and really grow successfully ... so that we can grow an even better community moving forward."

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**Source URL:** <http://www.mndaily.com/2012/11/08/panhellenic-council-considers-adding-new-sororities>

**Links:**

[1] <http://www.mndaily.com/news>

[2] <http://www.mndaily.com/news/campus>

[3] <http://www.mndaily.com/users/salisankusmndailycom>

## Appendix B – MN Daily Fraternity Article

# MINNESOTA DAILY

NEWS [1] » CAMPUS [2]

## Four frats seek return to campus

All four fraternities are re-establishing chapters that were once active at the U.

By **Samantha Alisankus** [3] December 04, 2012 (1 week ago)

As the University of Minnesota's greek population rises, so does expansion interest from new fraternities.

The greek community added more than 700 members to fraternities and sororities this fall, sparking interest from four fraternities — Theta Chi, Alpha Sigma Phi, Zeta Beta Tau and Zeta Psi — which are currently coordinating expansion efforts with the University's Office of Fraternity and Sorority Life.

Despite growth, the greek community remains one of the smallest in the Big Ten, with only 6 percent of the student population.

Matt Levine, program director for OFSL, said bringing chapters to campus creates an environment for healthy growth and competition among fraternities.

"It provides an opportunity to men who didn't want what we had but wanted to start something new," he said.

### Potential overlap

Fraternities looking to expand have multiple options. The University's Interfraternity Council operates under the North American Interfraternity Conference's open expansion process, which allows multiple fraternities to conduct expansion efforts simultaneously.

The process acts as a general guide for expansion and isn't mandatory. As a result, the process of coming to campus may vary from fraternity to fraternity.

Levine said limited resources are a primary concern when bringing new chapters to campus.

He said it's possible for incoming fraternities to overlap and recruit students from the same areas and groups on campus.



## Appendix B – *continued*

“We want chapters to be successful, but we don’t want to burn out resources or interested people,” he said.

But the North American Interfraternity Conference doesn’t see this as a concern. An expansion position statement on the NIC’s website states, “Until the number of fraternity men on campus begins to approach 75 percent, then this [limited pool of interested men] is an unfounded worry.”

None of the four expanding fraternities were concerned with potential overlap.

“We always find that there’s more good men to be in fraternities at every campus,” said Laurence Bolotin, executive director of Zeta Beta Tau. “I’ve never seen a university that does not have a good man that is willing to be a part of greek life.”

They also said they weren’t concerned regarding competition between expanding chapters.

“We try to support each other,” said Tyler Boisvert, director of chapter services for Zeta Psi. “The University of Minnesota is a big enough university where we think that everybody should be able to cohabitate at the same time.”

### History

All four fraternities are attempting to re-establish chapters that were once active on campus.

Zeta Psi was the first of the four to install a chapter on campus in 1899. Its Alpha Beta chapter remained active for 108 years until it left the University in 2007.

The chapter house — which now belongs to the University’s chapter of Sigma Pi — still bears the letters of the fraternity.

Alpha Sigma Phi was started in 1916 when the Omar Club, a group of 13 University upperclassmen, petitioned for a charter from the national Alpha Sigma Phi office. The chapter was forced to close its doors in 1935 in the aftermath of the Great Depression.

Three buildings on campus bear the names of Alpha Sigma Phi men: Northrop Auditorium, named for Cyrus Northrop — the University’s second president, Morrill Hall, named for previous University President James Morrill, and Wangenstein Historical Library, named after Owen Wangenstein, a former notable surgeon and University educator.

Theta Chi started a chapter at the University in 1924. After nearly 75 years, the chapter began to struggle with low enrollment and deterioration of its chapter house.

## Appendix B – *continued*

It officially closed its door in 1999 and remained vacant until 2002, when it was restored. It now serves as both the Kappa Pi Alpha chapter house and Bordertown Coffee.

Zeta Beta Tau is returning to campus in a slightly different form from its departure in 1952.

It originally existed on campus as a chapter of Phi Epsilon Pi, which was first on campus in 1923. In 1961, the fraternity merged with another organization but remained under the same name. By 1970, however, the fraternity again merged to form what is now Zeta Beta Tau.

All returning chapters said expansion requires a large amount of time and resources. Each said it has local support systems in place to assure sustainability over time.

But Levine said success will ultimately depend on the investments interested men are willing to make in the organizations.

“At the end of the day,” he said, “it comes down to what the students want.”

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**Source URL:** <http://www.mndaily.com/2012/12/04/four-frats-seek-return-campus>

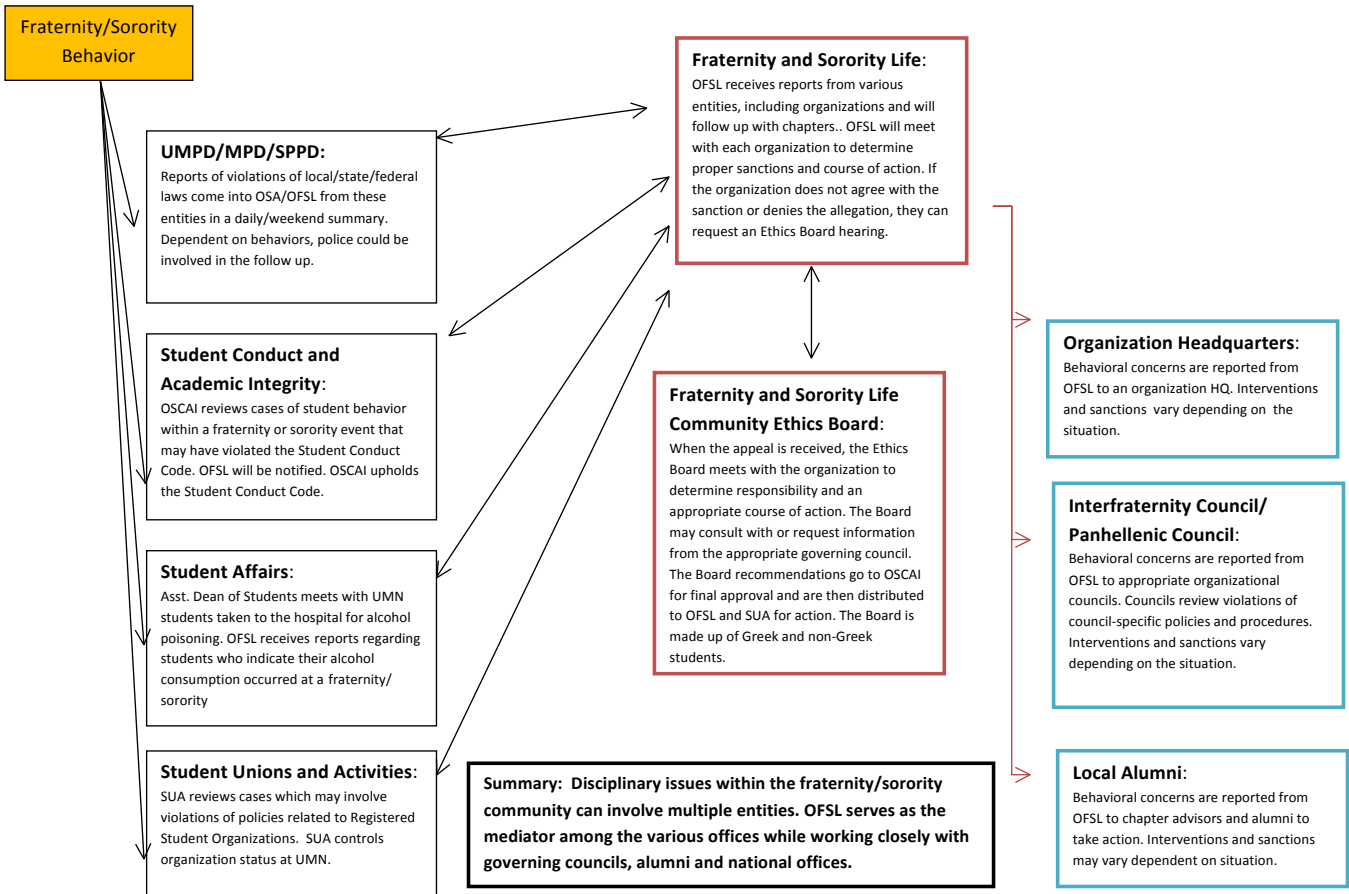
**Links:**

[1] <http://www.mndaily.com/news>

[2] <http://www.mndaily.com/news/campus>

[3] <http://www.mndaily.com/users/salisankusmndailycom>

Appendix C – Student Behavior Judicial Overview, Ethics Board



## Appendix D – MN Daily Fraternity and Sorority Community Ethics Board Article

# MINNESOTA DAILY

NEWS [1] » CAMPUS [2]

## Greeks create own ethics board

A new greek peer accountability system will go into effect this fall.

By **Samantha Alisankus** September 12, 2012 (3 months ago)

As the recruitment process for fraternities and sororities comes to a close, the greek community is partnering with the University of Minnesota's Student Unions and Activities for a slightly different type of recruitment.

For years, fraternities and sororities have relied on the SUA and Office for Student Conduct and Academic Integrity to resolve issues of misconduct within the greek community. Now the University is partnering with the Office for Fraternity and Sorority Life to develop an ethics board that could handle greek members breaching University conduct codes.

The Fraternity and Sorority Ethics Board would consist of both greek and non-greek members, and will function like a jury — a body of peers will hear appealed FSL decisions and come to a consensus as to whether or not they are fair.

According to FSL, the board will be large enough to compensate for potential conflicts of interest when chapter members have to hear cases involving fellow group members.

Nolan Anderson, president of the University's Delta Chi fraternity chapter, said those who serve on the board should be "people who are really interested in being involved, people with great moral fiber and those who want to see a positive effect in the community."

The idea behind the board is to give chapters and their members a chance to hold each other accountable for the values and expectations detailed in the FSL's 2011-14 strategic plan for University greek life.

Matt Levine, program director for FSL, describes the board as "an opportunity for a collaborative process between my office and students."

In addition to giving members the opportunity to review student misconduct cases, the board is designed to educate greek chapters on how to handle both internal and external disputes — ones that involve conflict between chapters or between chapters and the University.

Amelious Whyte, chief of staff for the vice provost for student affairs, said the new ethics board



## Appendix D– *continued*

mirrors the University's existing process for dealing with student misconduct.

Both begin with an informal meeting between the accused party and a University official. If the two parties cannot reach a consensus at that point, a formal hearing would convene.

One of the board's main goals is "for more peers to stand up and hold their peers accountable," Whyte said.

Although the ethics board wouldn't have the authority to directly administer punishment or hear cases that could result in expulsion, its voice would be a guiding force in further action, he said.

The project is still in its infant stage, and members for the board — which is expected to begin hearing cases this semester — are still being recruited.

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**Source URL:** <http://www.mndaily.com/2012/09/12/greeks-create-own-ethics-board>

**Links:**

[1] <http://www.mndaily.com/news>

[2] <http://www.mndaily.com/news/campus>



## Appendix E – 2011-2014 U of M Greek Strategic Plan

### Overview and Assessment

A Strategic Plan for the Greek community was developed in the spring of 2011. The plan is unique in that it is a comprehensive assessment of the University's fraternity and sorority community. The process engaged more than 100 stakeholders, including Greek undergraduates and alumni, University staff and faculty, and parents. The strategic plan process resulted in a mission and vision statement for the University's Greek community, a list of values which the community should strive to uphold, and identified learning outcomes for members of the Greek community.

The plan also identified seven strategic issues with specific steps that would, if followed, enable the community to successfully address each issue. The steps suggested are primarily tactical in nature and provide guidance to the Office for Fraternity and Sorority Life and the Greek chapters as they seek to undertake to improve operations and effectiveness of the community. Many of these recommendations reflect "best practices," some of which are in various stages of implementation. Although the plan identified the role of the Office for Fraternity and Sorority Life (OFSL) and undergraduates in this process, it did not include the broader University leadership or Greek alumni. Without a clear plan for engaging alumni, University leadership and current members, the 2011-2014 Plan provided more of a "wish list" of things that could be done than a road map for growth and improvement.

The work of the current Greek Community Strategic Task Force (GCSTF), with its clarity about the importance of engaging all three "legs of the stool" — the University, Greek alumni, and current Greek students — will provide a firm basis from which many of the recommendations (highlighted below) can be advanced.

### Highlights

#### *Vision of the Fraternity/Sorority Community at the University of Minnesota*

Fraternities and sororities become the most reliable and respected organizations at the University of Minnesota because all members align their actions with the Fraternity/Sorority Community's stated values now and throughout their lives. As a result every fraternity and sorority member contributes positively to the University of Minnesota.

#### *Values of the Fraternity/Sorority Community at the University of Minnesota*

Values are principles and beliefs that guide the actions of a person or group. The Fraternity/Sorority Community's members come to college with some values developed. Members join an organization with a set of articulated values. Additionally, there are values essential to the entire campus community. Common values unify and guide Fraternity/Sorority Community members. Membership in a fraternity/sorority helps students develop new and strengthen existing values.

#### *We value meaningful relationships...*

Demonstrated through a deep interpersonal connection among members. Each member can create lifelong relationships grounded in shared values.

#### *We value leadership...*

Demonstrated through opportunities for members to work collaboratively toward a shared goal. Each member can learn to guide and empower others.

#### *We value the pursuit of knowledge...*

Demonstrated through individual and collaborative work toward the accomplishment of academic and career goals. Each member has experiences in the classroom, their chapters, on campus, and in the local community that help them learn influential lessons for a lifetime.

#### *We value inclusion...*

Demonstrated by member's efforts to work with others and understand how diversity enriches learning. Each member can learn how to interact across differences in our global society.

#### *We value social responsibility...*

Demonstrated through hands-on service and philanthropic pursuits that benefit the campus and local community. Each member can become engaged in efforts to improve society and learn that their actions influence the greater good.

#### *We value members' development...*

Demonstrated through a well rounded and fulfilling college experience that results in the cultivation of personal and professional growth. Each member can have the opportunity to become the best one can be as a result of their fraternity/sorority experience.

#### *We value integrity...*

Demonstrated through ongoing efforts to align members' actions with organizations' stated values. Each member can develop the ability to make personal decisions based on individual and collective values.

#### *We value contribution...*

Demonstrated through active and positive engagement by our members in their organization and The Fraternity/Sorority Community. Each member learns how their contributions impact the greater good.

#### *We value lifelong commitment...*

Demonstrated through connections and networks developed in college that are grounded in common values and interests. Each of our members can choose to nurture these relationships and support their fraternity/sorority throughout their lives

## Appendix E – *continued*

### Learning Outcomes of the Fraternity/Sorority Community at the University of Minnesota

An outcome is an action that demonstrates learning, growth and increased competence. Successful members of fraternities and sororities at the University of Minnesota participate in local and national/international activities that develop or demonstrate the following outcomes...

1. Members become aware of individual, chapter, Fraternity/Sorority Community, and campus values; as a result, they reflect on how actions and values are aligned and aspire to increased congruence between espoused and enacted values.
2. Members learn to engage and empower others; as a result, they have an evolving definition of what it means to “be a leader”.
3. Members develop skills to work with others; as a result, they understand when to be interdependent and when to demonstrate autonomy.
4. Members successfully interact across differences; as a result, they can work skillfully in a global society, and appreciate shared and different worldviews.
5. Members improve communication skills; as a result, they develop the competence to efficiently communicate their ideas, both spoken and written.
6. Members across generations establish personal and professional connections; as a result, they develop lifelong friendships and foster mentoring relationships.
7. Members are provided opportunities to be academically successful and come to value knowledge acquisition; as a result they view their fraternity/sorority experience as influencing learning that informs decision-making throughout their lives.
8. Members develop a sense of respect and responsibility; as a result, members demonstrate genuine care and concern for others, and keep them safe.
9. Members understand the need to serve and provide financial support to their communities; as a result, they demonstrate civic engagement and become contributing members of society.
10. Members develop loyalty to the University of Minnesota; as a result, they demonstrate continued involvement and financial support of the university, academic departments, student life and/or The Fraternity/Sorority Community.
11. Members perpetuate the strength of their own fraternity/sorority experience as a result, they engage with one another as both mentees and mentors throughout their lives.
12. Members have a fun and valuable college experience; as a result, they understand how to enjoy life.

### Strategic Issue One: Mission and Values Congruence

Fraternities and sororities have a long history at The University of Minnesota. Within their fraternity/sorority, members can learn how to lead a life based on individual and shared values. Fraternities and sororities are, therefore, centrally positioned in the individual development of members. These organizations must focus attention on living their espoused purpose, demonstrating articulated values, and emphasizing the outcomes of membership. To address this strategic issue, we should 1) develop standards, 2) promote community values, and 3) increase education on fraternal values.

1. Develop standards for upholding Fraternity/Sorority Community values.
2. Promote values as core to fraternity/sorority experience.
3. Increase education on fraternal values.

### Strategic Issue Two: Inclusion/Diversity and Multiculturalism

The Fraternity/Sorority Community should reflect the diversity of the campus. All members should feel they are included and valued parts of the Fraternity/Sorority Community. Collaboration across diverse fraternities and sororities and organizations within the overall campus is vital to learn how to work with diverse others while at the University of Minnesota and become contributing members of society after college.

Additionally, forums to explore the value of differences must be provided. To address this strategic issue, we should:

1. Increase opportunities to learn about others.
2. Provide structure for the interaction of diverse organizations.
3. Establish efforts to recruit membership that is representative of the University.

## Appendix E – *continued*

### **Strategic Issue Three: Governance and Advocacy**

Managing the Fraternity/Sorority Community requires systems and processes to ensure it is run properly. Fraternity/Sorority Community leaders must govern and also advocate for the interests of the collective community. The responsibility of managing the Fraternity/Sorority Community rests with undergraduate members, alumni volunteers, headquarters staff members and campus and community stakeholders. Collectively, we can work together to uphold standards. To address this strategic issue, we should:

1. Improve shared-governing processes.
2. Examine efficacy of chapters in shared governance.
3. Strengthen the position and role of the OFSL.
4. Strengthen the consistency and long-term viability of governing councils.

### **Strategic Issue Four: Building Community and Fostering Collaboration**

The success of the Fraternity/Sorority Community depends on strong partnerships. Becoming a community is about understanding how we are independent and interdependent. It is vital to respect an organization's diversity and also understand commonalities that connect all members of the Fraternity/Sorority Community. There must also be connections made to the larger campus and Twin Cities community. To address this strategic issue, we should:

1. Emphasize relationships among Fraternity/Sorority Community chapters.
2. Strengthen collaborative relationships with administration.
3. Create connections with the campus and local community.
4. Improve communication and relationships with other stakeholders.

### **Strategic Issue Five: Learning and Development**

Students come to college to become educated for a career and active participation in a global society. Learning must be a priority in order for fraternities and sororities to be viewed as relevant to the larger campus community. Additionally, these organizations should foster healthy human growth and development. To address this strategic issue, we should:

1. Connect member experiences to learning and development.
2. Increase the connection between curricular experiences and fraternity/sorority membership.
3. Educate on issues relevant to membership in a fraternity/sorority.
4. Prepare for life after college.
5. Provide resources and services for members to learn.
6. Educate for Safety, Health and Wellness.

### **Strategic Issue Six: Membership and Resources**

Our future is dependent on recruiting the best students into our organizations. This may require changing the processes and structures we use for bringing in new members. We must attend to modern-day tactics to help students understand the benefits of membership in a fraternity/sorority. We must also use our resources wisely, expand our use of technology and work closely with alumni and parents to manage our overall Fraternity/Sorority Community experience. To address this strategic issue, we should:

1. Continue our legacy through support of recruitment and intake.
2. Attend to issues managing fraternity/sorority facilities.
3. Build Greek Village to provide opportunity for shared fraternity/sorority community living.
4. Use assessment to inform priorities.
5. Use technology to improve operations.
6. Increase Human and Fiscal Resources.

## Appendix E – *continued*

### Strategic Issue Seven: Marketing

Fraternities and sororities contribute in many ways to the University of Minnesota campus. It is important for the campus, Twin-Cities community and parents to understand the many positive opportunities that exist through membership. It is also important for members of the Fraternity/Sorority community to know what is happening across organizations. It is essential to develop an overall approach to promoting the value of membership in these organizations. To address this strategic issue, we should:

1. Inform potential members about the value of fraternity and sorority life.
2. Develop clear and consistent marketing materials about membership in the Fraternity/Sorority Community.
3. Target marketing efforts to specific populations.
  - Internal awareness among chapters.
  - External awareness among faculty and staff.
  - Awareness of Parents.
  - Awareness of Alumni and Headquarters.
  - Awareness of local community members (each semester beginning fall 2012).

### Strategic Planning Committee Members

Desiree Abu-Odeh, alumna member of Sigma Lambda Gamma Sorority, Inc.

Abbie Burgess, collegiate member of Kappa Alpha Theta Sorority

Kamarrie Davis, Multicultural Center for Academic Excellence

Tom Devine, alumnus member of Sigma Alpha Epsilon Fraternity

Chad Ellsworth, Office for Fraternity and Sorority Life

Dana Farley, Boynton Health Service

Katie Leinenkugel, President, Panhellenic Council

Nikki Letawsky Shultz, College of Biological Sciences

Lynn McGraw, alumna of Phi Mu Sorority; Twin Cities Alumnae Panhellenic Association

Sam Ndely, collegiate member of Phi Beta Sigma Fraternity, Inc.

Joe Sandbulte, President, Alpha Tau Omega Fraternity; representative for Interfraternity Council

Marj Savage, Parent Program

Lynn Swon, alumna member of Delta Gamma Sorority

Jan Tyson, graduate member of Alpha Kappa Alpha Sorority, Inc.

Dan Bureau, Facilitator

# ALUM BUILDING

**BUILDING THE ALUMNI COMMUNITY IN SUPPORT OF THE GREEK SYSTEM**

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## *Work Team Report*

### **Steering Committee Member Liaisons—**

Phil Esten\*  
Nancy Lindahl  
Jan Sickbert\*  
Lynn Swon

**Staff:**  
Matt Levine\*

### **Work Team—**

#### ***Co-Chairs:***

Michael Hsu  
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#### ***Committee Members:***

Cat Denison  
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\* Denotes U of M Staff



## Introduction

The charge to the Greek Alumni Work Team highlighted several critical issues to be addressed including:

- Assessing programming opportunities to re-engage alumni with the campus and the Greek community.
- Examining levels of involvement of alumni in current operations and chapter management and governance.
- Examining current relationships between local housing corporations and their National boards.
- Developing governance structures and communication processes that facilitate dialogue across the Greek community and with the University administration to support undergraduate education.

We believe the University is in a great position to enhance its alumni involvement in the Greek community. This includes enhancing the relationship with the students while they are on campus, before they graduate, and throughout their lives.

The Greek Alumni Work Team has identified several key areas in which we need to focus our efforts and energy. In the past, some work has been done in each of these areas, but our recommendations tried to include sustainable plans to help them become a permanent part of the Greek community at the U of M. This document will identify these key areas, talk about our discovery process for each of them and include recommendations for the future. We appreciate this opportunity from the University and the administrative and alumni leadership to examine this important topic. We look forward to strengthening our Greek community through these enhanced partnerships and continuing to enhance it over the years to come.



Listed below are the key Alumni Work Team recommendations in support of the Alumni role in strengthening the Greek community.

- |   |  |
|---|--|
| 1. Greek Alumni Council   | 8. Grade Reporting                                   |
| 2. Alumni Records   | 9. Greek Alumni Mentor/<br>Career Networking program |
| 3. Communications   | 10. Greek Job Board                                  |
| 4. Greek History  | 11. Chapter Governance/<br>Alumni Volunteer Training |
| 5. Special Events   | 12. Identify and Recruit<br>Greek Faculty and Staff  |
| 6. New Member Recruitment   | 13. Engaging Students<br>before they Graduate        |
| 7. 501(c)(3) contribution support for<br>Chapter House capital improvements<br>and undergraduate scholarships |  |

## Greek Alumni Council

### *Current Situation:*

In the past, there have been alumni groups to support the sororities and fraternities over the years. At one point, these committees/groups were essential to the growth and development of the U of M Greek community. All of these organizations are currently dormant or no longer exist. In order to ensure growth for the U of M Greek community, a Greek Alumni Council (GAC) is essential to the future success of the Greek system.

### RECOMMENDATION:

**Establish a Greek Alumni Council to give representation to Greek Alumni in matters affecting Greek life at the University and to serve as an additional conduit between the University and Greek Students. The GAC will interface with University in various ways and receive support from the Provost's Office.**

### Implementation Outline:

- Form a GAC that University key staff and leadership, and undergraduate Greek students can utilize for questions, recommendations, and input on compelling matters such as housing, recruitment, disciplinary actions, etc.
- We further recommend that the composition of the board include one Greek alumni representative from each fraternity and sorority house on the University of Minnesota campus. The individual Greek chapter advisory boards and/or House corporations would designate members to the Greek Alumni Council. Houses could designate alumni who do not serve on house corporations or advisory boards, but we suggest those members should have a working knowledge of the happenings and general financial condition at their individual Greek chapter. For chapters without an advisory board or house corporation, the alumni of their respective group would then select an "official" alumnus/alumna to represent the chapter.
- To address the many issues affecting Greek Life, the GAC should establish working committees to represent the Greek alumni community. Potential committees could include Governance, Finance, Housing, Communications, Student Behavior and Recruitment. Through these committees the GAC will develop meaningful relationships with IFC, PHC, OSA, Undergraduate education, HRL, UMF, UMAA and other University departments that can help to grow the Greek community. A possible UMAA Special Interest Group (SIG) would be a GAC affiliation. Additional staff support would be needed to ensure the success of this SIG.
- We believe the formation of the GAC will assist in achieving President Kaler's and the University's overarching goal of facilitating "the development of a sustainable and robust relationship between the University and the Greek community."



### Establish a Greek Alumni Council





## Alumni Records

### *Current Situation*

Throughout the years there have been some efforts to collect and record Greek data, but a formal process had never been put in place. The University of Minnesota Alumni Association (UMAA) asked for Greek affiliation several years ago (this information was self-reported) and they collected roughly 3000 records. However, this data was not stored in the Donor Management System (DMS), which is managed by the University of Minnesota Foundation (UMF), and is the University's main source for this type of information.

Through our work group, we have worked with UMF and they have agreed to code, track and store Greek affiliation data in DMS records.

In the first phase of this process, UMF received 10 years of data from the Office for Fraternity and Sorority Life (OFSL). Through their matching process, they found 89% of the records matched and were then coded with their proper Greek affiliation.

We are still missing a significant amount of data on our Greek alumni.

We also understand that the OFSL has paper records dating back for an unknown number of years.

### **RECOMMENDATION:**

**Request that the UMAA gather and have UMF enter all Greek affiliation data in to DMS. Develop an ongoing process to transfer records each year as students graduate.**

### **Implementation Outline:**

The University of Minnesota Foundation (UMF) has responsibility for managing data, and determining its appropriate use, on University alumni, friends, and donors. The data is stored on the Donor Management System (DMS). The UMF has agreed to add Greek affiliation information to the records of University alumni who joined a Fraternity or Sorority while at the University. In addition, they will store similar data on current students. The process below describes the steps by which data will be gathered and forwarded to the UMF for entry onto the database.



#### ***Gathering Student Data:***

- The Office for Fraternity and Sorority Life (OFSL) is responsible for gathering the student data.
- Data will be forwarded twice yearly, in the fall and spring, following the successful conclusion of rush/recruitment.
- Ideally the data will consist of: full student name, the student's University identification number, preferred address, phone, and email.

#### ***Gathering Alumni Data:***

- The University of Minnesota Alumni Association (UMAA) and the Office for Fraternity and Sorority Life (OFSL) are responsible for gathering historical information on Greek chapter affiliation.
- The UMF has already loaded data for members from 2001-2011. ►



- Steps to be taken:
  1. OFSL will contact each undergraduate chapter President and request the name and contact information for the Alumni Club President(s).
  2. OFSL will contact the Alumni Club President and request demographic information on alumni who are members of the local chapter.
  3. If the local Alumni Club does not have information, then they will be asked to contact their chapter's national office for further information.
  4. There are Greek alumni whose chapters no longer exist at the University. In this instance, the chapter's local alumni club and then national office will be contacted for the information.
  5. The UMAA will promote this effort to its alumni base and create a mechanism that allows alumni to self-identify. This could be done via an email and/or web presence.
  6. The GAC and UMF should develop an understanding regarding proper use of information provided by individual Greek chapters.

## Communications

### Current Situation

To our knowledge, there has been minimal, if any, all-Greek communications with alumni in any coordinated manner. There are many current publications such as the alumni magazine, where a Greek section could be included. There are also opportunities such as electronic media that could be utilized to create low cost Greek targeted communications such as email newsletters and smart phone apps.

### RECOMMENDATION:

Develop and fund a communication plan to communicate directly with Greek alumni.



### Implementation Outline:

- Form a committee within the GAC to refine and implement the comprehensive plan that has been outlined in detail:

The objectives of the draft communications plan include:

1. Develop effective strategies to identify and track Greek alumni.
  2. Develop communication mechanisms for reaching out to and connecting with Greek alumni.
  3. Develop opportunities for Greek alumni to become engaged with their chapters, the U of M, and with each other.
- A number of strategies to meet those objectives have been identified. Key suggestions include:
    - Overall/Foundational
      - Develop a look and feel for this campaign – graphic elements, key messages, web presence, etc.
      - Identify key contacts/champions to communicate with Greek alumni.
      - Survey Greek alumni to learn how they do or don't connect with the U of M and their Greek affiliations and what might entice increased engagement (what do they want and how do we get them back). ►

**Identify Greek alumni**

- Add Greek affiliation to DMS system – Begin with the 3,000 currently identified Greek alumni (covered in Alumni Records section of this report).
- Leverage University offices that work with Greeks and student leadership councils (IFC, PHC, MGC, OFSL, OSA).
- Develop a mechanism for people to “register” as Greek alumni in database.
- Reach out to local and national chapter boards.
- Pitch stories to local media.

**Develop effective communication mechanisms**

- Create an electronic newsletter for Greek alumni through the UMAA.
- Leverage social media, especially Facebook, LinkedIn, and Twitter – Use existing Facebook, LinkedIn, and Twitter pages and create new ones specific to U Greek alumni.
- Develop content to be included in an ongoing way in existing alumni, Foundation, college, and Greek communication vehicles – articles, ads, invitations to events, etc.
- Dedicate staff resources to produce and manage Greek alumni communications.

**Reach out to Greek alumni and provide opportunities for engagement**

- Re-establish/establish Greek alumni affinity groups through the UMAA.
- Establish a Greek Alumni Council (see prior Greek Alumni Council section).
- Leverage the return of Gopher football to campus as a way to bring Greek alumni back to the U of M.
- Establish Homecoming as the Greek alumni reunion event and build engagement opportunities incrementally each year. Consider how to cluster by graduation years.
- Establish an all-Greek reunion gathering and celebration during Homecoming 2014, which is the 100th Homecoming (see Events section, below).

To ensure this communications strategy is implemented on an annual basis, resources, both staff and dollars, will need to be identified.

**Greek History*****Current Situation***

Achievements of Greek students and alumni are not tracked, although once the Greek affiliations are coded into the DMS, we will have more information.

A full Greek history does not currently exist. It would be an excellent research project for some students (history majors).

**RECOMMENDATION:**

1. Develop a written history of the Greek system at the University.
2. Find notable Greeks and use them for recruiting.
3. Celebrate the achievements of Greek students and alumni.

**Implementation Outline:**

- Select a student team to research old Gopher yearbooks and Minnesota Daily articles and prepare a U of M Greek history.

## Special Events

### Current Situation

The University currently does not organize events for Greek alumni. As part of our ongoing efforts to re-build relationships with the Greek alumni community, our work group felt it was essential to create special events targeted at Greek alumni. We believe ongoing events will become a part of the charge for the Greek Alumni Council, but in the immediate future we have identified two key events.

One focus group with involved Greek alumni was conducted prior to the preparation of this report. Phone interviews with uninvolved Greek alumni were also conducted.

Attendance at sporting events can be increased by creating Greek sections at the major sporting events such as football games where attendance is low.

**2014**  
MARK THE U OF M'S  
**100th**  
ANNIVERSARY OF  
HOMECOMING

### RECOMMENDATION:

The two key events that we would recommend over the next two years are:

- **Greek Community Informational Reception & Meeting.** This would be targeted to all advisors, house corporation boards and any alumni that are currently involved with the U of M Greek community. The purpose of this event would be to allow alumni to network with each other and update and inform them of this extensive project and the projected progress over the next year.
- **100th Anniversary of Homecoming — All Greek Reunion.** The second event we will organize will be to reunite several generations of Greek alumni during the 2014 homecoming celebration. This event will reunite several generations of Greek alumni during the 2014 Homecoming celebration.

In support of these key events a quantitative survey will be developed to ensure that potential participants will be reconnected and reengaged on a timely basis.



### Implementation Outline:

- Form a Social Event committee within the Greek Alumni Council to work with the Alumni Association. Staff time and event budgets will need to be established and funding will need to be provided in order to make these successful.
- Work with the Athletic Department to develop a program to distribute unsold tickets to Greeks so the stadiums and other venues do not look empty during games. Many Greeks are already involved with spirit teams.
- Continue collecting and maintaining contact information for Greek alumni involved with their chapters' house corporations and advisory boards.

**Reunite Several  
Generations of Greek  
Alumni during the 2014  
Homecoming Celebration**



## New Member Recruitment

### *Current Situation*

Until recently, Greek alumni involvement has been mostly at the chapter level. Alumni from different houses have not been involved in planning and executing recruitment. Lists of incoming students are no longer available to IFC and PHC.

Alumni who own and manage residential facilities need to work together to plan and manage recruitment activities. The summer and fall of each year are critical times of year to fill beds in chapter houses. Significant loss of revenue can occur if beds are not filled within the first week of the fall semester.

In recent years, recruitment did not formally begin until the day before the fall semester. This placed significant strain on the members to conduct a successful recruitment and get a good start on their coursework.

In the Fall of 2012, fraternity alumni helped plan the first formal recruitment in over 20 years. Formal fraternity recruitment began on Saturday evening of Welcome Week and ran through Monday evening. The early recruitment initiative achieved positive results with more than 330 pledges accepting bids. This a significant increase over Fall Semester 2011 results.

Sorority alumnae have a long history of involvement with their formal recruitment process. This fall, sorority recruitment was also extremely successful with over 600 women registered. Quota was at a record high of 43.

The Panhellenic women are in a unique position to expand and grow over the next few years. The NPC extension process is rigorous and can be very challenging. It typically takes a lot of time and resources to open for expansion.

Fraternities need to increase their membership numbers. Only a few fraternities have close to or greater than 100 members, while almost all sororities will have 100+ members within this year which, at that level of membership, places strain on their housing facilities. The number of sororities on campus has decreased from 20 to 9 houses in the past several decades.

In the past, student athletes have been a significant part of the Greek community. More recently, student athletes have been discouraged from participating in Greek life. Currently, there isn't a written policy regarding student athletes participation in Greek organizations.

Growth of the Greek community cannot occur without concerted alumni involvement of behalf of the fraternities and sororities. ►



### **RECOMMENDATION:**

- Redesign fraternity and sorority recruitment to begin and finish prior to the beginning of fall semester 2013. Provide incoming student contact information to IFC and PHC for recruitment purposes.
- OFSL should aggressively lead and pursue an application to PHC to open for extension by fall 2013.
- Develop a plan to involve student athletes in the Greek System.
- Additionally, a permanent recruiting office should be created in a high traffic area such as the 17th Avenue Residence Hall to provide exposure to new students.

**Implementation Outline:**

- Immediately form an alumni recruitment committee working within the Greek Alumni Council to investigate fall recruitment lessons learned and design the recruitment program for 2013.
- Work with OFSL, OFYP and Housing to develop a plan to conduct formal fraternity and sorority recruitment prior to fall semester.
- Create a small subcommittee to specifically focus on Panhellenic expansion, supporting OFSL as needed.
- Work with the Athletic Department and other University departments to develop a written policy allowing student athletes to participate in Greek organizations.
- Locate space and allocate funds for a permanent recruiting office.

### **501(c)(3) Support for Chapter House Capital Improvements and Undergraduate Scholarship Contributions through UMF**

**Current Situation:**

The U.S. Greek community is the largest non-university provider of non-profit student housing with more than \$3 billion of property managed serving more than 250,000 students. Maintaining this housing stock in proper condition is primarily the responsibility of Greek alumni chapter members. Many individual chapter house corporations have successfully secured IRS 501(c)(3) private letter rulings providing for tax deductible contributions. In addition many national fraternity and sorority offices offer programs which offer tax deductibility options for individual chapters. The national office programs typically provide an allocation of capital improvement cost for deductibility based on a determination of the educational purpose.

Many fraternity and sorority chapter houses have received some type of historic preservation status. Here are examples of various classifications which facilitate favorable tax consideration for capital improvement contributions.

**National Register of Historic Places**

- University of Minnesota Phi Gamma Delta fraternity Mu Sigma chapter Partnership with the Preservation Alliance of Minnesota.
- University of Montana Sigma Chi fraternity Beta Delta chapter. Direct recipient of favorable IRS 501(c)(3) private letter ruling.

**National Society for the Preservation of Greek Housing (NSPGH)**

This organization is based at the University of Illinois in Urbana/Champaign, IL. It originated in 1988 and received Public Foundation status in 1992. Since that time more than \$3 million in grants have been awarded for the preservation and renovation of chapter houses. Contributions are tax deductible for approved projects. At present there are twenty eight members of NSPGH including twenty at the University of Illinois, three at Massachusetts Institute of Technology, two at Nebraska-Lincoln and Penn State University and one each at Depauw University and University of Georgia. A search of the website indicates that there are seventeen University of Illinois chapter houses on the National Register.

**University of Minnesota Greek Letter Chapter House Historic District**

In October 2003 the Minneapolis City Council established the University of Minnesota Greek Letter Chapter Historic District. The District is in two locations: The western section is generally bounded by University Ave. S.E., 10th Ave S.E., 6th St. S.E. and 12th Ave. S.E. The eastern section extends along University Ave. S.E. from 15th Ave. S.E. to 19th Ave S.E. There are 17 fraternities and 3 sororities in the University of Minnesota Greek Letter Chapter House Historic District. ►

### National Fraternity/Sorority Foundations

The national office of Pi Beta Phi sorority in Town and Country, MO has established a tax deductible fund to assist local chapters in raising funds for chapter house capital improvements. The MN Alpha chapter of Pi Beta Phi used this mechanism to underwrite the cost of an annex recently completed. The annex project followed guidelines provided by the national office which enabled the chapter to receive a 60% tax deductibility rate.

### MN Alpha Chapter of Sigma Alpha Epsilon Fraternity

The MN Alpha Chapter of Sigma Alpha Epsilon fraternity has applied for a favorable 501(c)(3) private letter ruling. (Application for Recognition of Exemption) with the assistance of the GPM law firm. The basis for the exemption includes the historic and architectural significance.

The common thread of these funding vehicles is most often two fold: Firstly an IRS approved 501(c)(3) contribution vehicle and secondly some identifiable historic significance for the property for which a capital improvement project is contemplated.

### University Foundation

The UMF has been an active member of the GCSTF Building the Alumni Community Work Team and has committed to making its DMS data base available as the central repository for Greek alumni information. In addition there are other opportunities for UMF/Greek community collaboration including\*:

- Scholarship Support
- Housing Renovation
- Fundraising
- Account Management

### RECOMMENDATION:

Conduct the additional due diligence needed to provide a comprehensive picture of the options available to U of M Greek letter chapters in funding capital improvements and undergraduate scholarships in partnership with UMF, national fraternity and sorority organizations and other non-profits committed to growing the Greek community.



### Implementation Outline

- Identify a small group (5-7 members) representing Greek alumni, U of M Staff and UMF that have skills, knowledge and experience in property management, historical preservation, fund raising and municipal ordinances.
- Continue engaged discussions with UMF to identify how its resources can best be leveraged on behalf of the U of M Greek community.
- Monitor MN Alpha Sigma Alpha Epsilon progress with 501(c)(3) application to determine if a favorable ruling can provide direction to other U of M Greek chapters.

\* The many ways a Foundation affiliated with a University can support the Greek community is reflected in Appendix A — Iowa State University Foundation Support of Fraternities and Sororities

## Grade Reporting

### *Current Situation*

An important element of Greek alumni success is the academic success of its undergraduate members. Grade reporting currently consists of a report of average GPAs for each fraternity chapter. This information is provided for active members and new members on a semester basis.

In order for a chapter to be considered in good standing with the University, it must submit member registration cards for 100% of its members. Chapters must also notify OFSL within 72 hours whenever an individual disaffiliates, graduates or is no longer considered an active member.

Graduation rates of Greeks as a whole have been calculated for students entering in 2005. The data for this analysis was provided by the Office of Institutional Research in February 2012.

### Track Grades and Graduation Rates by Chapter



### RECOMMENDATION:

Provide detailed academic data to chapter alumni such as grades by chapters, by colleges, by year in school, etc. to help alumni determine how to improve academic outcomes. Track graduation rates by chapter. Establish an academic oversight committee under the Greek Alumni Council to fulfill this function.

### Implementation Outline:

- During Spring Semester 2013 the academic oversight committee should work with the OFSL and other University departments to develop processes required to accomplish this recommendation. Once the reports are available, the academic oversight committee should communicate the results and provide recommendations to improve the academic performance of the Greek community.





## Greek Alumni Mentor/Career Networking Program

### *Current Situation*

Currently, any Greek alumni mentoring is done within the chapters and is managed by the chapter local alumni base. These programs may include alumni from other schools and is dependent on locating a willing mentor and matching with undergraduates with similar career aspirations.

Greek networking events have not been organized in recent years.

### **RECOMMENDATION:**

- Create a system wide program for mentoring undergraduate Greeks by Greek alumni.
- Invite Greek alumni to campus to share their experiences at a career seminar or event.
- Connect Greek alumni as guest lecturers with the Living/Learning Program.

### **Implementation Outline:**

- Form a committee (possibly the Social and Events committee) to explore ways to implement a system wide mentor program with Greek alumni. Set up career networking events for Greeks.

## Greek Job Board

### *Current Situation*

Greeks who are involved in hiring for their companies tend to look for other Greeks. The University's current job posting systems do not provide an easy way to target Greeks.



### **RECOMMENDATION:**

Create an online job posting system or create a Greek jobs section within the current system (Gold Pass) to help Greek alumni find undergraduate Greeks for internships and jobs.

### **Implementation Outline:**

- Form a committee to explore ways to implement a Greek job posting system.



## Staffing and Long-term funding

### Current Situation

Currently UMAA does not have staff to support Greek alumni activities and OSFL only has the Greek Advisor and two graduate assistants to support the undergraduate Greek organizations.

### RECOMMENDATION:

Provide short-term and long-term funding for staffing and other expenses to support and implement Greek Task Force recommendations.

### Implementation Outline:

- Form a financial committee within the Greek Alumni Council to work with the various University departments to determine the funding requirements of the Greek Taskforce recommendations.

## Chapter Governance and Alumni Volunteer Training

### Current Situation

Various models exist for chapter governance. Most chapters have an alumni association that includes local Twin Cities alumni regardless of school or chapter of initiation. Housed chapters tend to have house corporations composed of local and non-local alumni. Most chapters also have chapter advisor(s) and possibly an advisory board with specific functions such as finance, recruitment, ritual, etc.

Many alumni do not receive any formal training and do their best to help the undergraduates solve problems.

Some national/international headquarters provide training/workshops. Most have traveling consultants who visit the local chapter once a year or every two years.

FPA also provides financial support and training for undergraduates and alumni.

Many Minnesota Greek alumni have served on their national organizations and have a wealth of knowledge pertaining to chapter operations, fundraising, etc.



### RECOMMENDATION:

Create and conduct local training to help house corporations and undergraduates understand best practices in fraternity and sorority operations.

### Implementation Outline:

- Create an education committee within the Greek Alumni Council to develop training to help teach alumni and undergraduates how to operate their house corporations and undergraduate chapters.
- Provide best practices guidance in chapter house finance and operations.\*

\* Appendix B – Sorority House Corporation Best Practices

## Identify and Recruit Greek Faculty and Staff

### Current Situation

Most faculty and staff do not share their Greek affiliations if they are Greek. The University does not keep this information.

### RECOMMENDATION:

Identify and recruit faculty and staff to help improve and grow the Greek System by participating on committees, mentoring, advising, etc.

### Implementation Outline:

- The communications committee within the Greek Alumni Council will work with University Relations to survey faculty and staff for Greek affiliation and invite them to participate in the implementation of the Greek Task Force recommendations.

## GCSTF Alumni Engaging Students

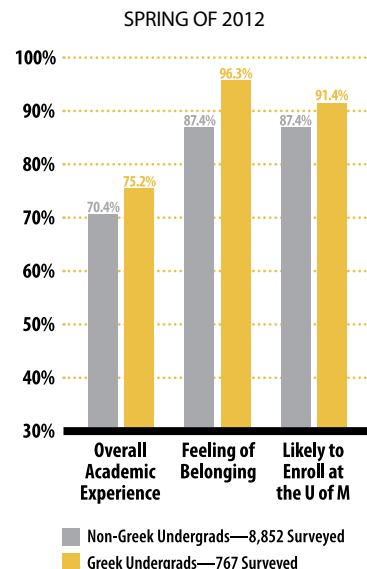
### Current Situation

In the Spring of 2012, the University of Minnesota participated in a Student Experiences at Research Universities (SERU) survey. 767 Greek undergraduates and 8,852 non-Greek undergraduates were surveyed. Included in the survey were questions about overall academic experience, feeling of belonging and willingness to choose the U of M based on overall impressions. In each instance the Greek undergraduate survey responses were more positive:

- Overall academic experience: 75.2 % v. 70.4%
- Feeling of belonging: 96.3% v. 87.4%
- Would choose to enroll: 91.4% v. 87.4%



### Student Experiences at Research Universities (SERU) Survey Results



It is important to leverage this positive Greek undergraduate experience response by developing programs which connect the student with his/her college prior to graduation. Each individual college has a development staff charged with the responsibility to engage with alumni but none currently have specific programs focused on Greek alumni. This opportunity can help the University, its colleges and the Greek community to feel a stronger sense of engagement.

**RECOMMENDATION:**

Create a program or series of classes and/or events to help undergraduates understand the benefits of being a University Greek Alumni.

**Implementation Outline:**

- Create a committee structure which will connect the UMAA with the Greek Alumni Council communications function to develop effective messages highlighting the benefits of maintaining life long relationships.



## Appendix A – Iowa State University (ISU) Partnering with Fraternities and Sororities

### Summary

The Greek community has a long, proud history at Iowa State. The first fraternity was founded on campus in 1875 and the first sorority in 1877. Currently, there are more than 50 chapters at Iowa State and many of the organizations are recognized nationally for their work. These organizations provide academic, social, and housing opportunities for their many existing and prospective members. Approximately 10% of all undergraduates are members of the Greek community with more than 2,200 students living in various Greek chapter houses. ISU Greek students are active and involved members of the university and the Ames Community. Greek chapters organize a variety of public service projects and activities that benefit the university, the community and the state in important philanthropic ways. Greek students are leaders, holding key positions in many campus organizations. These leadership opportunities are an important part of a student's personal and professional development. Oversight of all Greek activities is provided by the Office of Greek Affairs through the Dean of Students Office.

Over the years, the Iowa State University Foundation has partnered with Greek alumni and chapters to fulfill their philanthropic intentions. Donors have the choice to make charitable gifts to support a Greek chapter through either the ISU Foundation or the educational foundation of their national organization. The Foundation has relationships with many of the sororities and fraternities at Iowa State, the most common of which is fundraising for and administration of scholarship funds to be awarded to chapter members.

As part of its mission to support the university by securing and stewarding private gifts and grants, the ISU Foundation is committed to providing support and assistance to ISU fraternities and sororities. The ISU Foundation is a nonprofit organization established as a tax exempt 501(c)(3) organization by the Internal Revenue Service (IRS). In accordance with current IRS regulations, any charitable organization, including the ISU Foundation, is only able to receive and expend tax deductible charitable contributions for the activities of a fraternity or sorority that are purely educational in nature.

The purpose of this document is to explore and describe the ways the ISU Foundation can help fraternities and sororities with various educational fundraising efforts.

### Types of Projects

#### Scholarships

The ISU Foundation provides assistance to chapters of the ISU Greek Community through the establishment of scholarships which benefit the members of their respective Greek organizations. Scholarships are typically created for academic pursuit and leadership development. Currently, the ISU Foundation manages more than fifty scholarships through the Office of Greek Affairs. Due to the direct educational purpose, charitable contributions for scholarships are generally tax deductible.

As a fraternity, sorority or individual donor expresses an interest in establishing a scholarship, ISU Foundation staff members work with the respective party to identify the requirements and preferences surrounding the scholarship (grade point average, college year, leadership skills, sorority or fraternity affiliation, etc.). This information is documented in a gift agreement which is signed by the lead donor (if applicable), the ISU Foundation, and the Office of Greek Affairs. This gift agreement provides the base information for university and foundation staff to manage the account in accordance with the donor's wishes.

Scholarships at Iowa State can either be expendable or endowed. When a donor makes a gift to fund an expendable scholarship, the gifted funds are available to be awarded as a scholarship. A named expendable scholarship requires a commitment of \$1,250 per year for a minimum five year period. With an endowed scholarship, the donor's gift funds are invested in the foundation's long term pool, and a portion of the annual earnings are made available each year to fund the scholarship. An endowed scholarship requires a minimum investment of \$25,000 and is not available to be awarded until the endowment level is reached.

Throughout the project, the ISU Foundation provides the following services:

- Receiving charitable donations for the scholarship, tracking them in a separate account.
- Recording individual donations within the respective donor's record in the foundation's gift system.
- Providing an annual receipt to the individual donors documenting their gift(s) to the scholarship (along with any other gifts to the foundation).
- Investing the scholarship funds in the foundation's long term pool (if an endowment is to be created). Investment earnings are credited to the account after a spending payout is generated to fund the scholarship award and a foundation investment management fee is applied.
- As the scholarships are administered and paid through the university's Financial Aid Office, the foundation reimburses the university from the respective account.
- Provides oversight to ensure that the scholarship is being awarded correctly.

## Appendix A – continued

### Housing Renovations

The ISU Foundation is able to provide assistance to chapters of the Iowa State University Greek Community that are contemplating renovations to and/or expansions of an existing chapter house. However, per the IRS regulations referenced above, only the educational portions of a respective housing project (e.g., study rooms, libraries, computer wiring, etc.) are considered to be tax deductible. Accordingly, the ISU Foundation can only accept and expend charitable contributions related to the portion of a housing project identified specifically for such educational purposes.

As a fraternity or sorority is considering a housing renovation project, ISU Foundation staff will work with the respective organization's staff and volunteers to identify all requirements and next steps, including the extent of the foundation's involvement. An independent study and opinion from a third-party source (e.g., attorney, architect, etc.) will be required to document the expected breakdown between the educational and non-educational portions of the project. This independent study will lead to the establishment of a grant agreement between the ISU Foundation and the fraternity or sorority which documents the responsibilities of both parties, including assumptions and restrictions, the educational use calculation, record keeping, reporting, and grant disbursements.

Throughout the building/renovation project, the ISU Foundation provides the following services:

- Receiving charitable donations for the renovation project (educational use only), tracking them in a separate account.
- Recording individual donations within the respective donor's record of the foundation's gift system.
- Providing an annual receipt to the individual donors documenting their gift(s) to the project (along with any other gifts to the foundation).
- Investing the project donations in the foundation's Intermediate Pool (building projects) – earnings, after a foundation investment management fee, are credited to the account.
- Disbursing funds from the account for costs of the project upon receipt of a properly approved expense voucher with appropriate documentation.
- Providing any required reporting to the fraternity and other sources regarding funds received and/or disbursed, as needed.

### Fundraising Partnerships

The ISU Foundation Office of Annual and Special Giving (ASG) works with colleges, departments, and programs across campus to help them maximize the giving potential of their alumni, past donors, and friends through phone, mail, and e-mail solicitation projects. These same services can benefit fraternities and sororities in their fundraising efforts.

In an attempt to provide the best possible support to our campus partners and to ensure that our alumni, donors, and friends receive the highest level communication when it comes to fundraising, we seek to provide various levels of service based on the needs of our partners and our ability to commit the resources necessary.

#### Level 1: Full Participation

- Plan and execute a full scale phone, mail, and e-mail campaign on behalf of the sorority or fraternity.
- Cost: recovery of mailing costs (postage and printing) AND per contact charge for PhoneCenter (currently \$3 per contact).
- Timing: the ASG team will work to determine the best schedule for the solicitation plan with an eye toward maximizing results and avoiding overlap with other fundraising efforts.
- The ASG team will:
  - Purposefully plan and execute a full scale Annual Giving effort during either a fall or spring semester, or other time frame as determined during the planning stage.
  - Work with Greek leaders to determine the appropriate prospect list and work with the Foundation's IT team to prepare data for the project.
  - If appropriate, pull all prospects for the individual project from all other Annual Giving efforts.
  - Write and edit all mail pieces AND PhoneCenter scripts, with input and final approvals from the involved entity.
  - Conduct a mail – phone – mail campaign (two mail pieces and one phone effort).
  - Incorporate e-mail communications, if appropriate, at no extra cost.
  - Provide updates during the campaign and a final report of results post campaign.

## Appendix A – continued

### Level 2: Partial Participation

- Plan and execute either a phone or mail campaign on behalf of an individual entity.
- Cost: recovery of mailing costs (postage and printing) OR per contact charge for PhoneCenter (currently \$3 per contact).
- The ASG team will:
  - Purposefully plan and execute either a PhoneCenter campaign or a direct mail solicitation during either a fall or spring semester (or other time frame as determined during the planning stage). We will work with the organization to determine which type of solicitation strategy is most appropriate based on the message being delivered and the prospect list involved.
  - Work with Greek leaders to determine the appropriate prospect list and work with the foundation's IT team to prepare data for the project.
  - In the case of a phone campaign, we will determine the appropriateness of pulling prospects from other efforts, based on the timing of the solicitation and the prospects involved.
  - In the case of a mail campaign, we will schedule the piece to ensure that it does not overlap with most other solicitations that would include the same prospects. We will determine the need to pull the prospects from other projects on a case by case basis depending on the message, the list, and the timing.
  - Write and edit all mail pieces OR PhoneCenter scripts, with input and final approvals from the involved entity.
  - Incorporate e-mail communications, if appropriate, at no extra cost.
  - Provide updates during the campaign and a final report of results post campaign.

### Level 3: Minimal Participation

- Provide limited consulting services to an organization that is conducting their own mail solicitation (phone only in very special circumstances).
- Cost: none
- The ASG team will:
  - Review and edit solicitation pieces to help ensure that they are well written and include a solid case for support.
  - Provide gift return vehicle information to ensure that the piece meets the needs of our gift processing team.

- Work with IT to provide a solicitation code so that gifts may be tracked properly.
- If necessary, work with the entity to set up fund(s) for the project(s).
- Provide post campaign results when requested.
- Recommend a solicitation schedule that will maximize results and avoid overlap with other fundraising efforts.

### Developing Timelines for Annual Giving Program

- In order to execute a full or partial participation annual giving strategy the ASG team would require a minimum of six months OR one full academic semester advance time. This will ensure that all donors and prospects are properly segmented and scheduled to ensure that we are maximizing our fundraising communication in the most effective way possible.
- In order to provide effective feedback and other resources when conducting a minimal participation annual giving strategy, the ASG Team will require at least two weeks lead time prior to the anticipated mail/phone date.

### Account Administration

All accounts created as a result of Greek fundraising initiatives shall be administered in accordance with the ISU Foundation's policies and procedures and shall also be consistent with university policies. A summary of respective foundation policies is as follows:

- An administrative charge will be applied against the initial donation and all additional donations to the account in accordance with the foundation's existing fee policy. The current administrative charge is 5%.
- While donations to a specific account are tracked separately, any investment of the account funds may be commingled with other investment assets of the foundation.
- An investment management fee will be applied to any investment assets in accordance with the foundation's existing fee policy. The current investment management fee is 1.25% annually.
- Amendments to the gift or grant agreements will occur by mutual written consent between the donor (if applicable), the ISU Foundation, and the fraternity/sorority.

## Appendix A – *continued*

### **Sharing Alumni Information**

The ISU Foundation maintains current information on alumni and donors solely for the benefit of Iowa State University. We strive to respect the privacy and confidentiality of our constituents' personal and financial information and we do not sell or share this information outside the university.

Sharing of alumni information for university business purposes is governed by the "Policy for Release, Access and Distribution of Alumni and Donor Information." The following guidelines apply for handling requests specifically from fraternities and sororities:

- Addresses for non-fundraising mailings, such as newsletters, surveys or event announcements, will be provided only to an authorized mailing vendor to be handled at the chapter's cost. A list of authorized vendors will be provided upon request.
- Contact information will not be provided directly to the chapter or to chapter vendors, other than authorized mailing vendors.
- Fundraising mailings will be carried out only with authorization and supervision of the ASG unit.
- Information on alumni that have asked not to be contacted or solicited by ISU will be excluded.
- Information will not be shared to update "databases" or "files" on alumni or for purposes of the national organization.

It is important to note that the information available on a residence or chapter is based on individual self-reporting through alumni surveys.



## Appendix B – Sorority House Corporation Best Practices (Alpha Phi – U of M)

### Organizational Structure:

- A house corporation is nonprofit Minnesota corporation that owns the house and rents the facility to the chapter. The corporation and chapter establish a contract for rent each year requiring minimum rent amount based on agreed number of resident members and nonresident members.
- The corporation manages maintenance, improvements, and operations of the facility. The corporation buys essentially all items for the house. We have found it best that the chapter does not use its chapter dues money for house items and has a limit on total cash it can retain from year to year. If the chapter wants something for the house (couch, desks, vacuum, exercise equipment, etc.), the chapter should give the corporation the money and tell us what they want. This structure is beneficial so that appropriately durable items are purchased, warranty information is retained, etc.
- The corporation has a board of directors. Board ranges from 5-10 members, typically alumni, plus two representatives from the chapter that have a vote. To manage the workload and have diverse input, it is highly desirable to have 1-3 truly engaged members providing (1) employee oversight, (2) project planning and implementation, and (3) finance oversight. Primary responsibility of president is to make sure there are enough engaged board members.
- Each chapter member pays a one-time House Bond. This is her purchase into a share of the corporation. This money is specifically set aside for maintenance of the house.

### Staff:

- The corporation employs a Resident Director that lives in the house. Her primary responsibilities are to manage day-to-day maintenance, performance of the cook and housekeeper, and monitor for significant rule violations.
- The corporation employs a cook that orders all food and prepares lunch and dinner Monday-Friday.
- A part time housekeeper comes daily to clean common areas.

### Financial Management:

- Work with Fraternity Purchasing Association (FPA) to manage individual member invoices, create budgets, monitor AR, monitor spending vs. budget. Working with a bookkeeper is very beneficial as it limits time commitment for board members allowing them to be more involved in building relationships, long term planning, support chapter in filling house and managing accounts receivables.
- A set amount of money is paid by the members for chapter dues and a set amount for room & board for both resident and nonresident members. All members, resident or nonresident, sign a contract.
- Work with FPA to make sure our fees and salaries are competitive.

### 4. House Rules:

- Drug and alcohol free facility, no smoking on the property, no candles in the house.

## Appendix B – continued

### Best Practices

#### ***Rule 1: The House MUST be Full***

- Agree with the Chapter what “Full” means and help them understand that the only way to financial success, and therefore a well maintained house, is for the house to be consistently full. Talk to the executive members of the chapter, bring chapter members to the corporation meetings, attend a Monday night meeting. Preach it over and over. When you are able to do improvements, make it clear that it was because the house was full – keep it up and there will be more money for improvements.
- Chapter must have an occupancy plan that makes it clear the house will be full to a set capacity. It sets the order of priority if too many want to live in and order requiring residence if too few want to live in.
- Establish operational budget on slightly fewer than capacity so there is upside when the chapter is at capacity.
- Make it a preferred place to live that appeals to both the residents and their parents. Even simple amenities/ maintenance can go far – wireless internet, clean facilities, good interior and exterior lighting, passing city inspection, clean yard, mowing and shoveling.

#### ***Rule 2: Relentless Management of Accounts Receivables***

- Clear expectation must be set for members to pay their bills on time, in full, and follow through when expectations are not met. The corporation and chapter MUST get paid.
- Provide an incentive to pay in full early (2% discount), provide a penalty for payment plan option (\$25 fees).
- Make sure the chapter member managing finances gets support from either an advisor or HCB.

#### ***Rule 3: Focus on Expense Management and Financial Planning***

- Create an operational budget based on expected income. This brings focus to where the money is going and helps you see trends for better planning.
- Make sure your fees are competitive – the dorms and off-campus living near the University are expensive, make sure your are charging appropriate rates.
- Annually create a 5 year maintenance and capital improvement plan, making the chapter a part of the process.
- Don’t assume or rely on alumni donations for maintenance or capital improvement. It is too unreliable. Create a sustainable operational plan to year after year fund your own plans.

# HOUSING EXAMINING

## EXAMINING HOUSING AND FACILITIES OPPORTUNITIES

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### *Work Team Report*

#### **Steering Committee Member Liaisons—**

Doug Basile  
Mike Danley  
Jan Morlock\*  
Richard Pfutzenreuter\*  
Laurie Scheich\*  
Jon Steadland\*  
Pam Wheelock\*

#### **Staff:**

Steve Carnes\*

#### **Work Team—**

##### **Co-Chairs:**

Laurie McLaughlin\*  
Brian Wiessner

##### **Members:**

Trisha Adamson  
Dean Carlson\*  
Mannix Clark\*  
Tom LaSalle  
Jake Stanczyk  
Joan Wigginton  
Kwin Zemke\*

\* Denotes U of M Staff



## Summary of the Work Team's Charge

This Work Team is charged with addressing the facilities aspects of building a “sustainable and robust relationship between the University and the Greek community” which includes:

- An analysis of the physical condition and capacity of the University's Greek housing facilities with a focus on the fraternity system.
- An assessment of the options and barriers associated with facilities improvement.
- Recommendations regarding the financial, political, and other support needed to address the existing facilities needs.
- Discussion of the need and feasibility of expanding Greek residential capacity.

A leading spokesman<sup>1</sup> for a national fraternity recently wrote:

“Whether a chapter owns a free-standing facility, has a floor or unit in a residence hall or quadrangle, or is young and simply renting a house or an apartment . . . we have found there are four principles a (fraternity) must pursue vigilantly to ensure that the (student) experience is rewarding and complimentary to the objectives of our young men, their parents, our alumni, and the institutional environment in which we exist.

1. Is the facility safe?
2. Does the facility promote academic excellence?
3. Does the facility inspire and develop chapter brotherhood?
4. Is the facility competitive with other student housing options?”

These principles are equally applicable on the U of M campus and should drive our collective decision making. Aging and non-competitive Greek housing has become an issue on college campuses across the country.\* (See Appendix A). The situation at the U of M is no exception.

The Housing Work Group notes that over the past 30 years we have lost more than 40% of our Greek membership and number of Greek chapters. Over the same period of time our housing stock has also deteriorated in two ways:

1. The number of beds in the Greek housing system has declined by at least 40% (500 beds or more), and
2. The existing housing stock has aged (more than eighty years old on average) and deteriorated physically. The Housing Work Team has analyzed the state of Greek Housing and then developed recommendations for first stabilizing the long-term physical decline of this essential non-profit supply of student beds, and then presents its plan to expand the on-campus Greek community bed-count to accommodate the anticipated growth in Greek membership.

The Work Team's report studied existing and potential sources for Greek living spaces and makes recommendations along three major dimensions:

1. Current Greek Housing condition
2. 17th Avenue Residence Hall opportunity
3. Building New Greek Housing

*Source:* 1. Martin Cobb, Director of Advancement and Communications, Beta Theta Pi Fraternity

\* *Appendix A – Evolving Expectations*



## Current Housing Status

A recent forensic study assesses the current state of the existing Greek housing stock. This report concludes that an investment of \$13-15 million will be needed to stabilize the approximately 1000 beds represented by the current Greek housing stock by making the present Greek houses safe and functional. Additional expenditures may be necessary to furnish and decorate to competitive standards.

## 17th Avenue Residence Hall Opportunity

The Work Team has assessed the opportunity for the Greek community represented by the 17th Avenue Residence Hall. An examination of design of the 17th Avenue Residence Hall revealed some functional limitations for potential Greek tenants. However, University Housing has worked diligently with GCSTF representatives to achieve cost effective modifications to maximize the utility of the spaces designed for Greek use. The 17th Avenue Residence Hall facility represents an important first step to advance the Greek community through housing incoming freshmen potentially interested in Greek life; supplemental Greek bed capacity; incubator housing for two new chapters; and value added programming. The Greek Life living learning community for first-year students will be implemented beginning Fall Semester 2013 (the year the new residence hall opens).

Optimizing this opportunity will require a change in Greek culture to accept “off-chapter site” beds for a portion of its membership. This seems feasible since this is done on many campuses, but will require active “marketing” to the Greek community by HRL and OFSL.

## Building New Ground-up Housing Capacity

We have investigated the feasibility of building new ground-up housing on or near campus conditioned upon justification and vitality. This committee accepts that the Greek student experience closely supports the University’s mission with respect to retention and graduation, scholarship, mentoring, service, and alumni support. Moreover, the committee understands that the non-profit attributes of this source of housing combined with its programming offers a leverageable opportunity to pursue newly constructed facilities to add beds in support of membership growth. The current chapter house capacity limitations (sororities are at full capacity and fraternities average 75% capacity), highlights the need to seriously consider the construction of several new chapter house spaces in proximity to existing historical properties. This capacity should be built to reflect the housing configurations upper-division students are seeking and it should include a centralized commissary operation to support both new and existing facilities and shared common areas. In other words, some form of the “Greek Commons” model.



## The Historic Perspective on Greek Housing

### *A Long-Term Decay*

Based on supporting data provided to this Work Team it appears that the University's Greek community has declined by more than 550 beds from peak levels. This represents a loss (based on current replacement costs of about \$100,000/bed) of more than \$50 million of housing resource. The decline of these non-profit provided spaces occurred for varying reasons and decline continues. Much of this physical decline can be attributed to the organizations themselves. Irregular year-to-year revenue, fixed costs with variable membership revenues, lack of alumni oversight, and financial mismanagement are attributes of a long-term malaise. But, a major contributing factor as well has to do with the physical obsolescence of these structures. The combination of their inflationary costs and the weak economic performance has made it difficult for individual Greek house corporations to afford necessary upgrades that enable them to offer a competitive housing proposition to students.

### *A Look at the Decline from Peak Years (Post WWII)*

Combined, these non-profit facilities presently house about 1,000 Greek members and support an additional 800 members. The table here provides an historical perspective from peak years.

### An Historical Perspective

Post WW II History	Fraternities	Sororities	Total
Total	38	20	58
Inactive*	12	10	22
Current	26	10	36
Not Housed	0	1	1
Rented Premises	5	0	5
Re-colonizing-no house	3	0	3
Active/Housed	18	9	27
Active/Housed as % Total	47%	45%	47%
Current/ % no owned house	31%	10%	25%

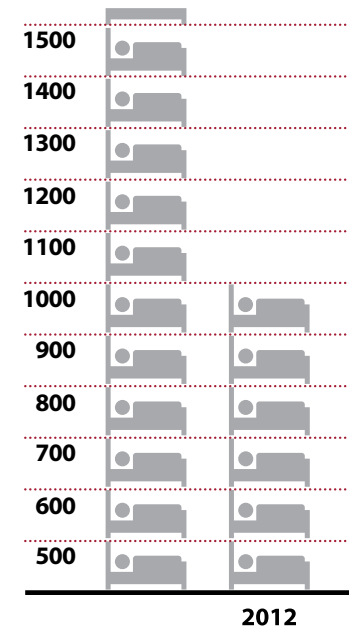
**\*Inactive Fraternities:** Tau Delta Phi (1952), Lambda Chi Alpha (1959), Phi Kappa Theta (1961), Theta Xi (1964), Zeta Beta Tau/Phi Epsilon Pi (1970), Acacia (1971), Delta Sigma Phi (1971), Beta Sigma Psi (1983), Theta Delta Chi (1984), Psi Upsilon (1993), Chi Phi (1994) and Zeta Psi (2007).

**\*Inactive Sororities:** Zeta Tau Alpha (1958), Alpha Xi Delta (1960), Sigma Kappa (1961), Delta Zeta (1965), Phi Mu (1970), Kappa Delta (1972), Alpha Delta Pi (1987), Chi Omega (1989), Sigma Delta Tau (1994) and Delta Delta Delta (2004).

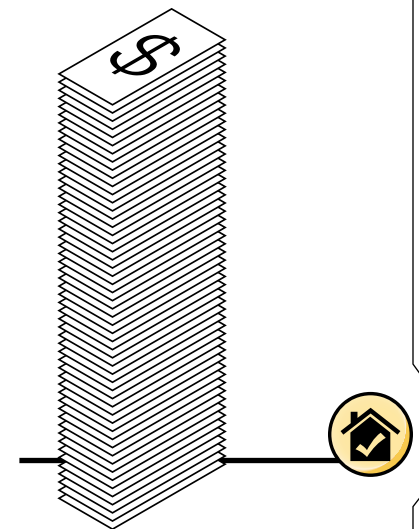
**Re-colonizing:** Theta Chi, Phi Delta Theta, Phi Kappa Sigma

**Not Housed:** Alpha Epsilon Phi

### Loss of more than 550 beds from peak levels.



### A more than \$50M loss.



**Replacement costs: Approx. \$100,000 per bed.**



Since 2005 there has been a significant resurgence of the Greek community. Substantial membership gains have been realized for both fraternities and sororities, and first-year student interest in Greek life was strong in the Fall of 2012.

U of M Greek Membership							
Fall	'05	'06	'07	'08	'09	'10	'11
Sororities	595	667	706	716	788	803	816
Fraternities	636	671	810	869	945	916	949
MGC*	NA	NA	NA	NA	51	53	61
<b>Total</b>	<b>1231</b>	<b>1338</b>	<b>1516</b>	<b>1585</b>	<b>1784</b>	<b>1772</b>	<b>1826</b>

## The New Era: Greek Turnaround Plan

### *Growth Model Implications for New Capacity Requirements*

Based on our analysis we strongly believe there is an excellent opportunity to grow and strengthen the Greek community. The two key qualifying conditions — *sine que non* — are leadership from the Office of the President and increased involvement of Greek alumni on an organized and consistent basis.

We also assume that the sorority extension process will support four additional chapters over the next five years and that additional housing and meeting capacity will be created to support system growth.

Based on these assumptions, significant growth opportunities lie in:

- Improved recruitment through better communications, a stronger value proposition, effective extension through new chapters, and cooperative efforts of alumni and university officials to advance the Greek community in positive ways.
- Improved retention through upgraded and expanded facilities, improved programming for Greeks, and strengthened adult oversight and alumni involvement.
- Strengthened system sustainability through improved operating and financial practices and modernized properties.



**Growth Model**

<b>First Year Students</b>	<b>AY 2012</b>	<b>AY 2018</b>	<b>Long-term Goal</b>
Male	2,716	2,700	2,600
Female	2,803	2,800	2,700

<b>Undergrad Students</b>	<b>AY 2012</b>	<b>AY 2018</b>	<b>Long-term Goal</b>
Male	14,869	14,900	14,400
Female	15,730	15,500	15,000

<b>Greek Membership</b>	<b>AY 2012</b>	<b>AY 2018</b>	<b>Long-term Goal</b>
Fraternities	987	1,448	1,872
Sororities	808	1,377	1,800
Total	1,795	2,825	3,672

<b>% Student Body</b>	<b>AY 2012</b>	<b>AY 2018</b>	<b>Long-term Goal</b>
Fraternities	6.6%	9.7%	13%
Sororities	5.1%	8.9%	12%

<b>Combined Increase in Membership</b>	<b>+1030</b>	<b>+847</b>	
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<b>Total Increase</b>			<b>1,877</b>
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## Additional Housing Capacity Required To Support System Growth

Ability to achieve the identified Greek growth potential — 1,000 additional members by 2018 and doubling Greek membership over the long term — is capacity limited.

Determining the number of additional beds required to support this growth in membership is an imprecise calculation since it depends on the ratio of residential members to total members. It should be noted that traditionally this ratio has depended on the percentage of students living at home (for free) versus those living on or near campus. However, the vast majority of first year students now living on campus (87% last year) and stay on or near campus in subsequent years — they don't move home except in dire financial circumstances. Consequently the combination of University, Greek, and private housing on or near campus must now meet the needs of essentially the entire student body. Essentially, the University's push to house most first-year students has dramatically increased the demand for on/near campus housing for sophomores, juniors, and seniors.

Because the University has historically focused on providing housing for first year students and left upper-division students to find their own housing, the ratio of members living in Greek housing vs. privately owned is determined by the quantity and quality of Greek housing available and student choices regarding affordability and lifestyle. Some Greek members go off campus for cheaper housing, some go to new and nicer apartments and freedom of lifestyle, and some stay in Greek housing.

Currently sororities are completely full and upper-division students generally have to move out to make room for new pledges. They serve as a feeder system for nearby privately owned apartments like nearby FloCo Fusion. While a portion of members would live in sorority housing if given the choice, the actual ratio would evolve over time.

The fraternity system needs to increase the average membership per chapter (currently about 40) and occupancy ratio (currently about 75%) to improve their economics and sustainability. However, merely growing the size of chapters solely through non-residential members is not a feasible long-term strategy for sororities and the larger fraternities. They lack space for meetings of 100 or more and dramatically increasing the size of a chapter will change the unified nature of member relationships.

Academic FY '12	Sororities	Fraternities	Total Greek
Members	808	987	1,795
Reported Bed Capacity	363	673	1,036
Non-Live-In Members*	445	314	759
% Beds to Membership	45%	70%	58%

\* at full occupancy

Clearly some of the non-residential sorority members would live in, if chapter house capacity were available. Thus, the above 45% ratio is capacity constrained. Improved quality of Greek housing would likely create increased demand for in-house beds. As a matter of policy and best practices, maximizing the residential aspect of Greek life optimizes the member benefit and the value of the Greek community to the University.

**Thus we would conclude that we need to house at least 50% and perhaps 60% of the anticipated membership growth, similar to the present status.**



At the most recent reporting sororities were full and fraternity occupancy was at about 75%. The larger fraternities, however, are at capacity and already need more beds to grow. Taking the fraternity occupancy to 95% would absorb about 160 new members. Up to 200 Greek beds could be obtained in the new 17th Avenue Residence Hall. The rest would have to come from new capacity. In addition, about 150 beds are in leased premises and would need to be replaced by more modern and permanent capacity. In fact, 9 of the 36 chapters (25% of the total) do not currently own houses and thus would ultimately need housing.

Demand Potential	To 2018	Longer Term	Total
Member Growth	+1,030	+847	1,877
New Beds Required at 50%	515	424	939
Replacement for Leased Beds	150	0	150
Total Need	665	424	1,089

Supply Potential	To 2018	Longer Term	Total
Improved Fraternity Occupancy	160		160
17th Avenue Residence Hall (max)	200		200
<b>New Bed Capacity Needed (at 50%)</b>	<b>305</b>	<b>424</b>	<b>729</b>
Additional New Capacity Needed (at 60%)	103	85	188
<b>Total Potential New Capacity Needed</b>	<b>408</b>	<b>509</b>	<b>917</b>

The additional capacity goals reflected in the above table assume restoration of all of the existing housing stock. If financial or physical issues become obstacles to renovating any of the existing Greek housing stock, the new capacity needs would be increased by the amount of existing capacity lost.

In addition to bed capacity:

- There is also need for meeting and dining spaces to hold 100-200 people at a time for meetings since existing sororities and large fraternities are already short of capacity.
- Achievement of the growth goals will also require 6-8 new chapters which will require chapter house facilities as well as beds.
- A common commissary and/or catering facility are also needed to support existing chapters as well as new ones. (See Greek Commons concept discussed below).
- Additional parking capacity needs to be considered.



### Capacity addition through acquisition and renovation of existing buildings.

With nearly two dozen Greek organizations having left the U of M campus over the years, there may be some former Greek buildings that could be returned to Greek chapter use. There are also other buildings that could potentially be acquired and repurposed to Greek use. This approach to capacity addition might be more suitable for sororities than fraternities since more of these structures are located in the 10th Ave./Marcy-Holmes area than on Fraternity Row. However there are three major barriers to this approach to capacity building:

- **Timing.** Existing buildings come to market periodically, but not necessarily when a Greek chapter is at the stage of actively seeking a permanent home. In the mean time such buildings can get acquired by private developers for other purposes and be demolished or repurposed and thus get taken out of the potential supply of Greek housing.
- **Cost and Suitability.** Like present Greek houses, most of the acquirable existing buildings are old and in need of significant renovation. The renovation cost issue is magnified by Historical Preservation status of both current Greek houses and potentially acquirable structures. Historic Preservation rules sometimes make needed facility improvements prohibitively expensive, encouraging inaction regarding deferred maintenance. The combination of acquisition and renovation cost can be prohibitive and renovation takes time.
- **Regulatory Restrictions.** The City of Minneapolis has adopted restrictive zoning regulations that represent a potential barrier to repurposing a building to Greek chapter use. The goals of both zoning regulations and historical preservation rules are laudable. Nearby residents want to protect their way of life and preservationists don't want to lose architectural features and structures of historical significance. Representatives of the Greek community are respectful of these values and want to be good neighbors whose presence can add value to the community.

**We believe the interests of all parties would be better served by collaborative efforts of the University and representatives of the Greek community in working with neighborhood groups and regulatory authorities to review and modify current rules for mutual benefit. (See Appendix A and B).**

#### RECOMMENDATION:

- Provide a catalog of applicable Greek Letter Chapter House Historic District and Minneapolis Zoning Code regulations that affect Minneapolis Greek community chapter house operations.
- Convene a workshop that enables Minneapolis Greek community chapter house (undergraduate members and Alumni house corporation members) to learn about effective property management best practices consistent with current Minneapolis Zoning Code regulations.
- Carefully review current Minneapolis Zoning Code regulations and identify those which place undue restriction and hardship on chapter house operations.
- In conjunction with University Relations identify the most effective manner of securing relief from Minneapolis Zoning Code Regulations that impose excessive burdens.



\* Appendix B – Historical Designation and Minneapolis Ordinances

\* Appendix C – Chapter House Historic District Map

## Implementation Outline

- Identify a small group of (5-7 members) representing Greek alumni and U of M staff who have skills, knowledge and experience in chapter house property management, University neighborhood relations, historical preservation and Minneapolis Zoning Ordinances.
- Identify important community stakeholders who can positively influence outcomes and determine the most effective means of engagement.

### Summary and conclusion

Acquiring and repurposing existing housing stock into Greek chapter use can be a partial solution to the capacity building need. However, limited supply and difficulty in matching periodic demand with periodic availability make this a relatively unpredictable and unreliable capacity source. In the meantime, we face the prospect of loss of potential housing locations through demolition or conversion to non-Greek uses.

### RECOMMENDATION:

Greek alumni and the University should collaborate in assessing potential capacity addition through acquisition and, with University affiliates, consider the possibility of a housing/land bank plan to be implemented as suitable structures in the area become available for sale.

## Opportunity #1: Resolving the Decline of the Existing Greek Housing Stock

### *The commissioning of a Forensic Survey*

In response to the charge and at the suggestion of the University, this Work Team commissioned a Property Condition Assessment (PCA) that was paid for by the University. The PCA was conducted on a representative sampling of 10 fraternities and sororities in accordance with American Society for Testing and Materials (ASTM) standards. The primary goal of the PCA study was threefold:

1. Catalog physical condition and deficiencies of the sample group of properties.
2. Provide opinions of probable costs for remedies of deficiencies.
3. Through extrapolation, develop estimated costs associated with remedying deficiencies across Greek-owned structures.

The PCA study did not render opinions regarding aesthetics or use of space. Nor did it make assessments, other than visual, on operating systems such as boilers, kitchen fixtures etc. Therefore, the PCA is a preliminary tool for roughly estimating the size of a funding pool that might be needed to bring the Greek housing stock up to an objective standard yet to be established.

In addition to the primary objectives, the PCA referenced secondary information related to historic preservation, life-safety elements and aspects that impact building use related to food service operations.





### General Findings

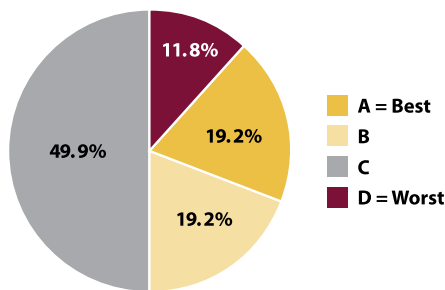
The examined structures were assigned grades relating to general condition pursuant to the nearby table. Keeping in mind that a PCA collects observations with no intrusive inspections (e.g. in the wall lead piping, if it exists, would not be observed, for example) with the result that actual costs can vary greatly from plan, the PCA estimate of costs for improvements indicates a range of costs as follows:

**10-year Estimate of Cost per Organization Type (34 Properties)**

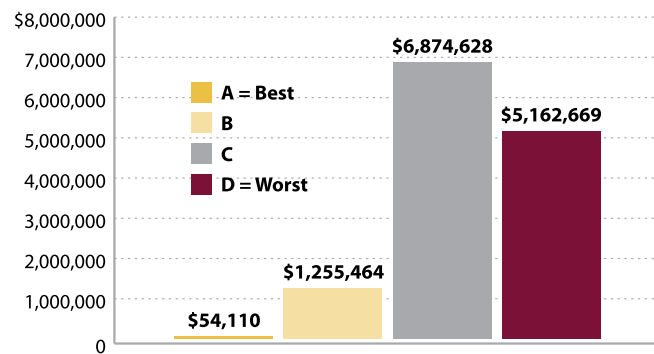
TYPE	SQUARE FEET		10 YR COST	
	BLDG	% OF TOTAL	\$	% OF TOTAL
FRATERNITY (24)	217,809	64.3%	\$11,876,532	89.0%
SORORITY (10)	120,705	35.7%	\$ 1,470,340	11.0%
<b>TOTAL</b>	<b>338,514</b>		<b>\$13,346,872</b>	

Extrapolation based on PCA findings of 10 properties.

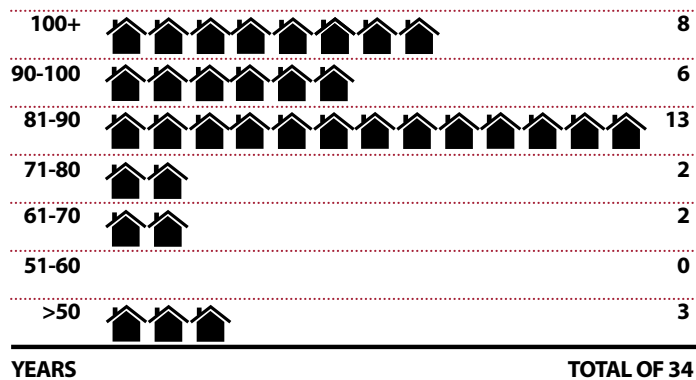
**Distribution of Houses by Grade (Quality)**



**10-year Estimate of Cost per Grade**



**GCSTF Chapter House Age Distribution**



The study reveals that the sorority housing is, on average, much better maintained than fraternities. This reflects stronger, more consistent alumni engagement and oversight as well as broad adoption and implementation of best practices for financial and operating management of chapter houses.

The study also reveals serious level of underinvestment in long-term maintenance in recent years, especially by the fraternities.

An extrapolation of these results applied across the campus-wide universe of 34 chapter houses (24 fraternities, 10 sororities) indicates an investment of \$13-15 million will be necessary to make existing houses safe, structurally sound, and functional. Additional investment may be desired for furnishings and cosmetic needs. A strong case can be made that Fraternity Row is becoming an eyesore rather than an asset due to the poor exterior condition of many fraternity houses. With football now back on campus and the extensive array of athletic facilities now located on the eastern portion of campus, the road to the University's primary athletic venues should be paved with more than good intentions. Improving the appearance of University Avenue would benefit the overall campus impression. This would suggest that we should encourage interior and exterior renovation with proper attention placed on the features that optimize "curb appeal" rather than trying to reduce the scope of renovation to minimize costs.

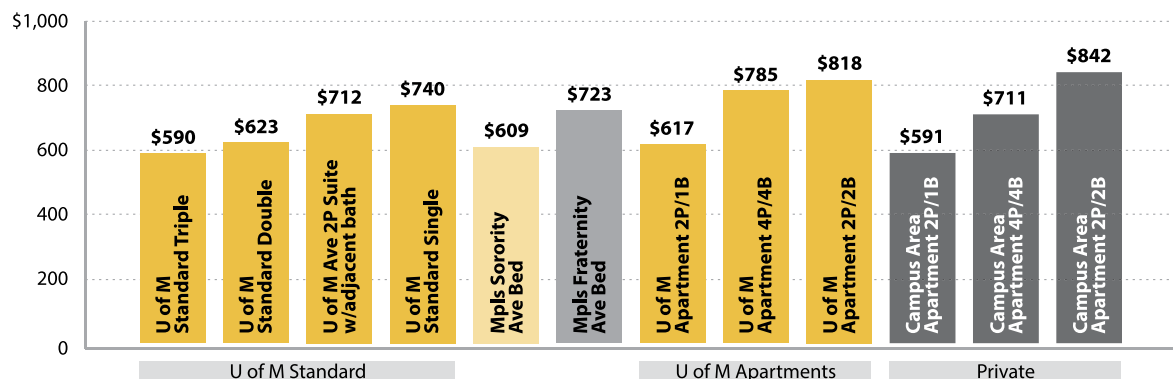
Exterior work may involve additional costs resulting from Historical Preservation requirements. A contributing factor and barrier to improvements is a historic registry designation that makes an already obsolete structure even more costly to remodel and operate. If a roof was copper when built, the replacement roof must also be copper at a rough cost of \$120,000 as compared to less expensive materials. A fire-suppression retro-fit can easily approach \$100,000. The cost quickly expands when considering window replacements, boiler repairs, electric and plumbing upgrades, and edifice maintenance. The fact is that a hodge-podge of conditions exist across the 34 fraternity and sorority structures that are caught in a time-warp between functional obsolescence and historic preservation.

However, without intervention, the decline will continue. The rate of decline will be most prevalent with those structures in most need of improvements and for which attempts at solutions are most intractable. Because they are alumni owned, this Work Team concludes that alumni partnering with the U of M has to be part of the solution. Now it is a matter of re-constituting a new way of conducting the partnership and, in conjunction with this mandate, to reach new accords towards a model of governance and operations that supports common goals.

### Affordability

Any look at housing costs has to attempt to understand cost along the continuum of older vs. newer structures. The accompanying chart attempts to provide an apples-to-apples look at student rents per bed in these sectors.\*

**Monthly Bed Rental Rates – U of M Housing, U of M Fraternities/Sororities, Campus Area Apartments\***



\* Appendix D – Room and Board Rate Comparison

\* Appendix E – HRL Business/Finance Model

Affordability is always an issue, especially with rising tuition and a soft economy.

However, we would make the following observations:

- The room cost component of Fraternity and Sorority fees is very competitive vs. University provided housing and new private housing built recently near campus.
- A \$10 million loan to refurbish 1000 existing bed capacity at \$10,000/bed compares with a cost of about \$100,000 per bed if built new.
- A loan equal to \$10,000 per bed would require about \$50 per month extra per bed to service. (\$10k, 30 years, 4% interest).
- A new more competitive and attractive facility can provide better value (quality/price) even at a higher price.
- Alumni contributions and house corporation funds could be used to defray a portion of the costs.

### *Financing Improvements*

At many campuses the University has taken a lead role in financing renovation or construction of Greek housing.\* We believe this will be a necessary requirement to achieve our goals at the U of M campus as well.

Some of the renovation costs may be met through fundraising with alumni, a challenging, time-consuming process with uncertain results. Securing debt financing is a major challenge to individual chapters, and tends to be expensive, limited in availability and duration.

### **RECOMMENDATION:**

Create a task force comprised of U of M staff and Greek leaders to jointly develop a viable, low-cost, long-term vehicle to finance necessary improvements to insure that existing Greek housing facilities are safe, competitively equipped, and attractively presented and maintained. Some urgency is attached to this recommendation in light of the current low interest rate environment and the need to make Greek housing more competitive with newly constructed options on or near campus. Improved housing facilities will also strengthen the value proposition of Greek membership and facilitate recruitment.



\* Appendix F – A University Steps Up

## Opportunity #2: 17th Avenue Residence Hall

In response to overtures by Greek alumni, the University designated that up to 200 beds would be available for the Greek community in the 17th Avenue Residence Hall project and that additional chapter organization meeting space — so called chapter house fronts — be developed on the University Avenue frontage in conjunction with the overall plan. The necessity of a tight time-line and the substantial requirement for new student housing required this Work Team to investigate and seek retro-fitted options to the initial facility design to better meet the needs of the Greek community. University officials, students and Greek alumni leaders from this Work Team, worked together to identify changes that will better meet the needs of the Greek community. The University received cost estimates for the recommended design changes and has identified funding sources for the following interior design changes:

- Infrastructure that would allow for the development of “secured pods” within the structure to enable Greek membership to approximate the Greek life-style experience that is found in free-standing Chapter housing. This would require the installation of security doors and card access for spaces comprised of 15 to 30 or more beds per pod, with the installation of card access readers and security doors added when a Greek chapter signs a master lease with the U of M for a specified number of beds over an agreed upon time frame.
- Ancillary to the preceding requirement is the need for re-configuring access to a stairwell to enable better ingress/egress by Greek members to their living spaces within the building.
- Revisions to the two chapter room/chapter house front spaces to deliver a better approximation of the Greek community’s expectations. Their use is primarily social and informal — more like a home’s Family Room including the option to entertain buffet style. Accordingly, a minimal serving counter and appliances have been included in the re-design of the chapter rooms. To gain more space, a vestibule intruding into the main room from the front-entry has been eliminated.
- Design changes to the third smaller chapter room so that this room has the flexibility to be used as a multipurpose Greek community space. Potential use of the space includes private dining space for chapters leasing the two larger chapter rooms, and/or for other Greek chapters; meeting space for IFC, PHC and multicultural Greek leadership groups; and programming or activity space for the Greek community.

In addition to the interior design changes noted above, the University is in the process of obtaining cost estimates to provide an “at grade” plaza for the fronts of the two chapter rooms located on University Avenue.

Additionally, the University will continue to explore the options to provide catered meals on a regular basis to nearby Greek facilities whose kitchen operations are either inefficient or out of compliance with code.



### *Incubator Space*

Even with the recommended design changes and accommodations, the 17th Avenue Residence Hall is not of a size and layout to meet the long-term needs of a successful Greek chapter. Thus, the Work Team has concluded that these spaces overall function as an “incubator space” for the development of new chapter organizations. Additionally, the 17th Avenue Residence Hall provides an ideal housing option for first year students potentially interested in Greek life. Eventually, as the incubation of the newly colonized chapter organizations matures, more permanent housing for the initial users of that space would need to be found so that the value proposition inherent in their programming can be fully realized. Examples of Greek programming use include:

- Formal and informal dining space for daily use.
- Social event spaces; e.g. game-day alumni gatherings, Sat-night parties, family invitees, etc.
- Daily interactions and unplanned interactions that further bind a community.
- Meeting and presentation space; e.g. alumni presentations, scholarship programs, speakers, etc.
- Business work-space for managing chapter operations including bill-collection and maintenance payments and also volunteer service programs.

Housing & Residential Life (HRL) and the Office of Fraternity/Sorority Life (OFSL) has also developed a Greek Life living learning community for first-year students who are interested in and potentially participating in fraternity/sorority life. Special leadership and educational programming offers great potential to the Greek value proposition.

A number of issues regarding the Greek use of the 17th Avenue Residence Hall are yet to be worked out. With the 17th Avenue Residence Hall opening in September, 2013, there is an urgent need for resolution of these issues through collaboration between the Greek community and the University.\*



\* *Appendix G – 17th Avenue Residence Hall Issues*

### *Suitability for Women*

It has been suggested that the 17th Avenue Residence Hall may be less attractive to sororities than fraternities. The present sorority housing is concentrated in the 10th Ave./Marcy-Holmes area which is seven blocks west of this project. Additionally, sorority protocols and management are different than fraternities. Sorority national organizations enter into a compact amongst themselves and with their respective campuses that ultimately drives certain design requirements. Business issues related to risk management and insurability extend from these mandates. Sororities for example cannot have members living in spaces with gender-neutral hallways. Living spaces must be contiguous to common area spaces and sorority organizations have a greater need for some formal dining and meeting spaces than are required by fraternity operations. On the other hand, the proposed design modifications may mitigate some of these issues and the opportunity to re-colonize in a new facility in a great location with Greek programming may prove attractive to a re-colonizing chapter or a sorority seeking additional bed capacity.

**While there are still substantive issues to resolve, optimizing the 17th Avenue Residence Hall opportunity is a key near-term step in growing and strengthening the Greek community and thus deserves focused attention of both Greek alumni and the University.**

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### **Opportunity #3: A New Facility for Expanded Access to the Greek Experience**

At the most basic level, Greek housing competes against every other housing option available on or near campus, and all offer trade-offs. This report previously discusses deferred maintenance and elements of obsolescence associated with existing Greek structures. The most substantive limitation of the 100 year-old chapter house designs is that they cannot offer the modern room configurations so frequently being built now on other campuses. These designs typically offer private bedrooms off small, core common areas that sometimes include galley kitchenettes. U of M housing strategy largely defers to the off-campus student housing market for this type, which is popular, substantially more expensive. Upper division students may find this configuration more attractive than traditional dormitory rooms designed primarily for first year students. Parking is also frequently reported to be an issue for upper class students who require transportation to jobs and internships.

Limited bed capacity is a major barrier to growth of the Greek community. Sororities are full and already average over 100 members per chapter. Fraternities last year averaged 75% occupancy and have about 200 beds to fill. The availability of existing buildings suitable for a Greek chapter is extremely limited and zoning regulations hinder repurposing existing buildings to Greek chapter use. As noted above, growing the Greek community to 9-13% of the student population will require 500 to 1000 additional beds





### *Issues of Scale and the In-House vs. Non-Resident Membership Ratios*

As a part of understanding the basic comparative bed-counts, the Work Team has studied and sought answers to the issue of scale as relates to fraternity and sorority houses and also at variables in the ratio of live-in members to non-live-in members. If there were no natural caps on membership size per organization, then the straightforward matter of expanding membership would be to simply increase membership size. But, there are self-fulfilling natural caps which the Work Team sought to understand as it relates to expansion options.

For example, on the lower end of membership scales, ‘head-count’ weighs importantly on the ability of the organization to sustain itself particularly as it relates to funding true operating costs including deferred maintenance. While other campuses were looked at, this study needs to look no further than the local experience. With respect to fraternities, it is clear that when live-in membership drops below roughly 35 members, a downward spiral of inter-dependencies associated with property condition, programming (including scholarship), alumni involvement and recruitment is triggered. Conversely, peak memberships seem to naturally ‘top-out’ with memberships of 80 to 100 in fraternities having more space and 90 to 120 with sororities. Among the reasons gleaned by this Work Team are that as populations get larger, the sense of community changes with devolution towards cliques and sub-groups. Most important, physical spaces for meals and meetings constrain scalability and other programming becomes unwieldy.

### *Sorority Scalability*

The sorority system on this campus provides an example of how scale is handled. Unlike fraternities which allocate rooms based upon seniority, some sororities have an ‘up and out’ policy so that new members can enter the live-in fold each year — with the promise of housing as part of the recruiting value proposition. Juniors and seniors — other than officers — are thus forced from the chapter house into the private housing market. This creates a dilemma for students and chapters because the private sector cost puts pressure on the ability to continue paying non-resident membership dues and meal-plans.

This year’s recruitment drive for sororities brings the issue of scale to the forefront. The average woman’s pledge class this year across all sororities was 43 members, bringing overall membership to over 100 for a sorority organization. These historically, “peak” numbers for sororities have not been seen since the early 1980’s. While access is “capped” for various reasons, the major impediment to increasing the current population relates to scaling beyond the current population relates to bed capacity and chapter-house space. Fraternities and sororities reserve Monday nights for their formal all-members dinner meetings. These are the weekly events that bind the communities and when business is conducted, respective alumni are engaged, speakers are heard and programs are planned.

Accordingly, it appears that the sorority system is at capacity. The demand indicated in this recruitment year suggests a short-fall of at least 4 chapter houses. On a comparative note, 10 sorority chapter properties and a large quantity of beds have been lost.



### *Fraternity Scalability*

While the growth of sororities is constrained by space, fraternity growth is more likely constrained by the quality of the housing product. It is understood that for both men and woman, an attraction — perhaps the primary one — is to investigate Greek campus life for what it offers as a housing option. Another section of this report highlights the stark contrast between the typical fraternity vs. sorority chapter house as it relates to condition, quality and the ability to accommodate various program options (including meal-plans). The Forensic study has already demonstrated a correlation between fraternity occupancy and condition; e.g. properties in poor shape attract fewer members which limit programming and under-funds maintenance and the cycle repeats itself.

We need to increase the average size of fraternities to achieve financial stability for the Greek community. This is reflected in our task force growth model goals.

### *The Ratio Factor*

The ratio of live-in member vs. non-live-ins — is an important factor in forecasting the need for new Greek housing. The Work Team found that across the Big Ten the average ratio was in a range of 30 to 60% of live-ins to total members. However, many factors weave into the ratio issue. Among them are variables associated with housing alternatives including proximity to campus, affordability and room privacy and lay-outs. The Work Team concluded that a better analysis must look at local factors over time.

With respect to U of M, at the basic level, the shortage of proximate housing at reasonable cost has enabled chapter properties to be fully occupied for the most part in good times and in bad for all but those in the poorest condition. The key reason that some of these properties maintain occupancy is their location and economics in a tight student housing market. A secondary reason is that these organizations have the ability to demand that members live in before leaving chapters with unfilled beds. Some chapters feel unable to fulfill demand for housing and would retain more members as live-ins were they able to supply spaces. In any case, whatever the ratio, members who don't live in chapter houses compete for housing, either on or off-campus and relatively few students remain at their family homes today. **A survey of house corporate alumni suggests that on this campus a manageable and enduring ratio hovers around 50% beds to overall members.**

### *The Private Sector Supply*

Yudof Hall, built in 2002, was the last new student housing facility built by the University. The building's rooms consist primarily of one and two bedroom apartment style rooms with a shared common space and small kitchen, and suite-style rooms with a shared bathroom and small kitchenette. The unit types offered in Yudof Hall provide an attractive on-campus housing option for upper division students. Some unit types within Yudof Hall have the highest on-campus housing rates. Since Yudof was built, private developers have constructed roughly 12 apartment-style student-focused buildings that offering 1,200 units (2,700 - 2,800 beds). All are reporting full occupancy. This has spurred yet more proposals by private developers for additional housing. Again, nearly all seem to expect market demand for luxury-style housing to continue unabated.

There are two contributors to this demand. The first relates to the boomlet of high-school graduates seeking admission to the University coupled with the U's objective of supplying every in-coming first-year student with an on-campus housing space. Since the University has focused on housing for first year students, many second and third year students look to the private market for housing. Some second and third year students want to migrate off-campus anyway, seeking privacy and self-sufficiency, oftentimes at a much higher cost. However, we believe more suitable Greek and/or University provided housing would attract a segment of upper-division students to stay on campus and reduce Greek attrition in the process.



### *Design as Relates to Mission and Value Proposition*

There is also anecdotal evidence that another driver is in play. Some members of the Work Team believe the desire of upper division students to move off campus is in part due to the age and design of the existing campus inventory. The demand for apartment-style housing, both on and off campus, suggests that this may be the case. Since housing is part of the competitive offering of a university, other schools have opted to build more apartment style facilities. In addition, the respective missions of both the University and Greek alumni are advanced when there is opportunity for interaction between upper division and lower division students. This interaction supports the Greek value proposition and thus needs to be accommodated in any new housing design and construction. Greek housing traditionally offers this type of experience — freshmen and upper classmen interact daily on a peer-to-peer basis. Hence, when students become seniors, they not only are in a mentoring role themselves, but they remain connected to a person now four years removed who is likely in the work-force. This rolling eight-year span of peer-to-peer connectivity creates a powerful, enduring life-long network — a network that can be called upon for friendship, support, jobs, and service.

Because the “joining” decision of any prospective Greek member often includes a “living” decision, consideration must be given to market dynamics. Generally, existing Greek chapter-house sleeping rooms are old-style dorm rooms, but their non-profit model offers cheaper space at a central location with social and networking programming as a plus. In fact, despite the old-style designs, many second and third-year Greek members find their chapter houses appealing as compared to alternatives. Nonetheless, new Greek housing will have to accommodate some of the more modern attributes such as some semi-private beds and be offered at a mid-range price point. Since one of the goals is to reduce attrition after freshmen have joined a Greek organization, capacity additions should offer an “apartment style” option as contrasted with traditional “dorm style” beds more suitable for first-year students.

### *The New Greek Housing Context*

While this Work Team believes demand exists for new housing centered on the Greek experience, it also concludes that the case for new housing must be economically defensible. There is an affordability gap between the on-campus, first-year student residence hall and the off-campus, luxury student suite. Anecdotal feed-back has indicated resistance to the high prices demanded at the upper-end of the market, and there even appear to be waiting lists for the mid-range offerings. With the larger value proposition that the Greek community offers in addition to just housing, there definitely appears to be demand for living options that bridge the cost and design gap.

The dormant CSHI group, in fact, incorporated these attributes into their conceptual planning for a Greek residence. The architects had captured trends in student-housing design on a national basis. The plan included the room layouts amenable to upper division and graduate students, populations the University felt was currently under-served. For the most part, the primary physical difference between the proposed Greek housing and that sought by upper division/graduate was the inclusion of common areas (chapter meeting spaces, member dining, etc.). This aspect of design is a necessity of the Greek life-style because it is the essential modality for providing the peer-to-peer mentoring that is one of the cornerstones of the Greek experience. The Greek community seeks to accommodate the full breadth of classes under one roof — even in room-sharing, whereas the University’s historic approach tends to stratify its housing based upon year in school.



In addition to delivering affordable housing with designs students want, there are these additional considerations:

- The overall design must accommodate Chapter-Fronts offering unique entrances and common areas specific to the using group. Meeting spaces (formal and informal), permanent dining areas for everyday meals, and the latest technology are needed.
- Any new structure should consider parking for the residents and the campus at large. Students, especially upperclassmen, have jobs. Such parking should be optioned to users first at an up-charge from base rent.
- Any new facility should make bed capacity first available to Greek members; unallocated rooms and spaces would be made available to students at large. Thus, the upper floor spaces should have some flexibility to accommodate ebb and flow of demand and be able to revert to broader student needs.
- Greek affiliated housing has to be able to leverage and activate alumni support in two ways: 1) as potential monetary contributors to the project; and 2) to galvanize and re-energize connectivity between alumni and undergraduate members.
- A centralized food facility is essential to the operations of the new users and it can be a much needed supplier to the older rejuvenated historic chapter houses contributing greatly to their vitality and viability.
- New Greek housing should be proximate to the existing historic properties to maintain a sense of community among Greek students and alumni, to support the gathering of alumni and undergraduates on football game days and to allow efficient sharing of food services.
- The development of Greek housing must be executed jointly by Greek alumni and the University under a partnering arrangement that meets the business needs of both parties.
- An operating framework between the University and the Greek alumni groups must be put in place that countenances all the issues each party foresees, including day-to-day facilities management, behavioral controls, maintenance, security, arbitration of disputes, and financial or operating default.

### *Location Planning*

**Designation of space in the University Master Plan for future location of two or more Greek Commons developments is desirable until the development plans are ready to implement.**

- Locations need to be identified for both sorority and fraternity housing
    - FRATERNITY ROW
      - 1500-1900 between 4th Street and University Avenue should be reserved for Greek and other student housing.
    - SORORITY ROW
      - 10th/University/Marcy-Holmes area may be most appropriate for sororities.
- Consideration should be given to:
- ▶ Securing a Greek Commons location, and/or
  - ▶ A housing/land bank plan implemented as suitable structures in the area become available for new chapter extensions.



## **Organizational and Operational Requirements and Considerations for New Non-Profit Greek Housing**

The recommendations by this committee to fund upgrades to existing beds and finance new housing development also require a significant change in the way the University and the Greek alumni view each other. A critical component in creating this change is the establishment of an effective and well-supported Greek Alumni Council whose purpose would be to bind Greek alumni into one voice and to create single entity for working with the University on the broader issues associated with the Greek undergraduate and alumni constituency.

Yet a different governing mechanism will have to be established to deal with management of the elements associated with financing and developing new housing.

### ***The Non-Profit Partnering Model***

This Work Team is not prepared to define the form or make-up of an ownership structure to execute an efficient development plan for new housing. The issues associated with engaging alumni, designing a project, financing and then developing it are complex and require selective skills and experience. There are tax, legal, and financial implications associated with a joint collaboration. They are solvable, however, and public/private partnering structures are in widespread use elsewhere related to real estate development including on a variety of campuses.

A central aspect of this Work Team's proposal would be that the University's partner would operate as a non-profit entity. This should enable the partners to develop and deliver an offering that compares favorably with for-profit development in the market-place.

Included amongst a variety of structuring options are:

- Non-profit entity led and governed by Greek alumni leadership with the University as principal lender.
- Non-profit entity with University as a partner in ownership and governance as well as serving as principal lender.
- University owned/financed project with 99 year leases to house corporations.

The structure needs to reflect a partnership between the parties to achieve mutual benefit and an appropriate sharing of risk and reward. A true collaboration is required to work through the complexities of a multi-party project.



### *University/Partnership Funding and Financing*

A portion of the funding may be raised from Greek housing corporations. However, under any of the structural options, it will likely be desirable and probably necessary for the University to be the principal source of debt financing.

- Complex ownership structure involving several entities as tenants and/or owners.
- New entity with lack of operating history.
- Local funding sources prefer short duration financing.
- University has access to low cost, long term funding sources.

Consistent with other University financial commitments for student housing, any debt instrument should be soundly structured with the expectation of full return of-the investment and full cost recovery of the cost of capital. Risk must be balanced with reward.

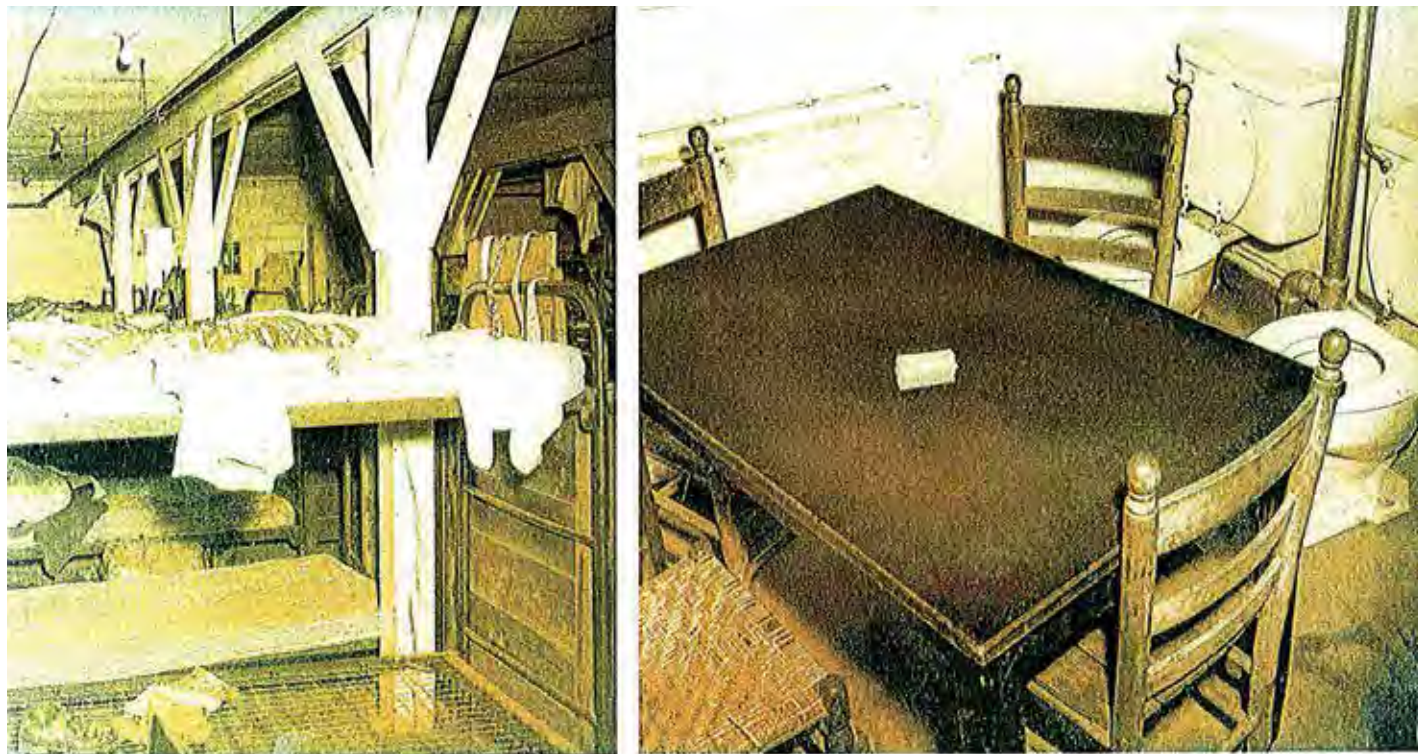
#### **RECOMMENDATION:**

- A task force, comprised of Greek leaders and U of M staff, should be established and charged with evaluating feasibility and structure, and developing a plan and recommendations regarding development of one or more Greek Commons projects.
- New Greek housing locations should be identified and reserved.





## Appendix A – Evolving Expectations



# Evolving Expectations

Historically, college housing was often an afterthought. University funding was primarily invested in classrooms, research labs and facilities, along with athletic programs, faculty salaries and other campus priorities.

Traditionally, student housing was single-sex, double or triple occupancy, and institutionalized. Students lived in dorms or boarding houses often located adjacent to campus. Following World War II — and with the assistance of the GI Bill — veterans flooded campuses, and student housing changed in dramatic ways. Construction was taking off on campuses from coast to coast. Fraternity chapter houses were stuffed to the gills. Vet Villages sprang up, overflow housing became the new normal and wherever free space could be found, students were placed.

### ACCOMMODATING BOOMERS

The trend continued as baby boomers began enrolling in college. Massive building projects were underway on campuses to accommodate the increasingly larger student populations. On many campuses, high-rise halls were constructed with hundreds of students under one roof. Long hallways with standard double rooms, nondescript furnishings and communal showers were standard fare.

Fraternity houses also accommodated the increased membership brought on by the boomers by building new houses or expanding sleeping spaces. Dark, cold-room dorms, with row after row of double-decked bunks were common. Similar to their dormitory cohorts, there was little, if any, privacy. Housemothers ruled the roosts, often teaching etiquette, good manners and interpersonal skills, while supervising kitchens and mentoring the young fraternity men.

### A COMMUNITY APPROACH

As enrollments stabilized in the '70s and '80s, student housing changed more in terms of the experience than in the construction of facilities. The days of *in loco parentis* passed and with its departure went many of the rules and customs that once seemed orthodox. Visitation rules changed. Not only were men now allowed to visit women's floors, they could now live on the same floors.

Themed living and learning communities on many campuses are the current trend where



## Appendix A – continued

"Past generations  
barely considered housing options  
when selecting a college ...

*Today's students expect all  
of the bells and whistles in  
their living space."*



students choose to live in halls that are focused on academic majors or interests, such as the arts, healthy living, leadership and more. (Miami University in Oxford, Ohio, for example, now offers 35 different themed residence halls.) These living and learning halls focus on building community around a core academic area or subject interest. Some classes are even held within the halls, further extending the classroom to the student living experience.

### GREATER DEMANDS

College enrollment today is again growing with an estimated 80 million "echo boomers" flooding the campus housing market. According to the Institute of Education Sciences, college enrollment in the United States jumped 38% from 1999 to 2009, to 20.4 million students — and enrollment is expected to continue to grow.

Student housing is once again a priority. What differs from the past, however, is the student demand for their housing arrangements. Past generations barely considered housing options when selecting a college. Instead, emphasis was placed on academic major, costs, financial aid and distance from home. Students arrived on campus with a suitcase in one hand and a trunk filled with clothes clutched behind. In contrast, many students today arrive with their moving vans in tow filled with clothes, furniture, entertainment systems, computers and printers. Today's students expect all of the bells and whistles in their living space. Now, housing options often include private or semi-private rooms and bathrooms, suites, kitchens with high-end stainless steel appliances and granite counter tops, workout facilities, high-speed Internet, recreation rooms, swimming pools and retail on premise, including coffee shops and mini-marts. The days of barrack-style housing are, for the most part, long gone.

### CAN THE CHAPTER HOUSE COMPETE?

As campuses evolve to meet students' housing demands, the relevance of today's fraternity house must be examined. Are chapter houses "up to snuff" with the competition of university housing or the private apartment/housing facilities that have feverishly sprung up?

Pete Smithhisler, executive vice president of the North-American Interfraternity Conference, comments, "The older infrastructure of many fraternity houses put them at odds with today's student lifestyles." Smithhisler believes housing remains an important part of the overall fraternity experience, but is concerned about facilities that are unappealing to students. "It used to be an honor to live in a chapter house. Now, the goal oftentimes is to get out as fast as you can."

While not all Beta Theta Pi chapters and colonies live in official chapter houses, the fact remains that all collegiate Betas can benefit from a living environment that is **safe**, **brotherhood-** and **academic-centered**, and **competitive** with the demands of today's student housing trends. The Fraternity's chapters at the University of Missouri, the University of Utah, and the University of Alabama have each recently initiated major housing initiatives that address many of these concerns head-on. While addressing contemporary desires, they also remain true to their historic commitment to Beta's principles. Each chapter made wise investments to ensure their facilities met safety standards and personal interests of students, while also being transformational in their impact on the fraternity experience.



### Housing by the numbers:

**62:** Beta chapter houses  
owned by a house corporation

*Less than 50% of these facilities have  
sprinkler systems.*

**2.1:** Beta chapter houses  
that are university owned

**8:** Beta chapters renting  
living space from a  
private owner

**3:** Beta chapters with other  
facilities owned by house  
corporation (e.g., lodge)

*The balance of chapters live on a dorm  
floor, have a meeting room or suite  
provided by the university or have no  
chapter space at all.*

*In addition, some Beta chapters and  
colonies are working on current  
housing projects (e.g., Denver,  
Kentucky, Arkansas, Michigan State).*

*If you'd like to learn more about your  
chapter's housing initiatives, please  
contact the chapter counselor or  
house corporation president.*

**464:** Current house  
corporation volunteers

## Appendix B – GCSTF Housing-Historical Designation/Minneapolis Ordinances

### Current Situation

The U of M Minneapolis campus Greek community fraternity and sorority houses are bounded on the West by 10th St. S.E., the North by Sixth Ave. S.E., the East by 19th St. S.E. and the South by University Ave. There are thirty properties included in this area, nine sororities and twenty one fraternities. These chapter houses are in two locations, the western area includes five fraternities and nine sororities and are part of the Marcy-Holmes neighborhood and the eastern area includes sixteen fraternities along University Ave. S.E. and adjacent side streets. This eastern area is often referred to as “fraternity row.” The two areas are separated by the Dinkytown commercial district. These Greek community properties include several architectural styles and periods and range in age from 50 to 110 years in age. Most often these properties are owned and operated by Greek Alumni House Corporations who are responsible for maintenance, capital improvements and sound financial operations including Profit & Loss, Balance Sheet and Cash Flow management.

In October 2003 the Minneapolis City Council established the University of Minnesota Greek Letter Chapter House Historic District (GLCHHD). Most of the chapter houses in the Historic District were built between 1907 and 1930 and many were designed by prominent local architects. The principal entities providing oversight for the GLCHHD include the Minneapolis Heritage Preservation Commission (MHPC), the Minneapolis City Planning Division and the Minnesota State Historic Preservation Office. These offices have responsibility for evaluating proposed alterations to existing properties and new construction. The GLCHHD has established Design Guidelines containing specifications for ten categories including Roofs, Windows, Entries, Architectural Features and New Construction and Additions. A chapter house in the GLCHHD contemplating property modifications in any of these categories is required to present a plan which will be reviewed and acted on by the MHPC. Depending on project scope a public hearing may be part of the review and approval process.

In addition to the GLCHHD requirements, Minneapolis Zoning Code provisions are also a part of the approval process for Greek community chapter house improvements. There are several Minneapolis Zoning Code residential property sections that pertain to fraternities and sororities. In addition there are two sections that specifically reference fraternities and sororities.

- Definition of fraternity or sorority (Chapter 520.160).
- Specific development standards pertaining to fraternities and sororities. (Chapter 536.20) This Chapter includes several provisions regarding facility operations including location, persons served, on-site services, new construction, landscaping and a management plan.

Minneapolis  
City Council  
Establishes  
the University of  
Minnesota Greek  
Letter Chapter  
House District  
(GLCHHD)

OCTOBER  
2003



### Principal Entities Providing GLCHHD Oversight

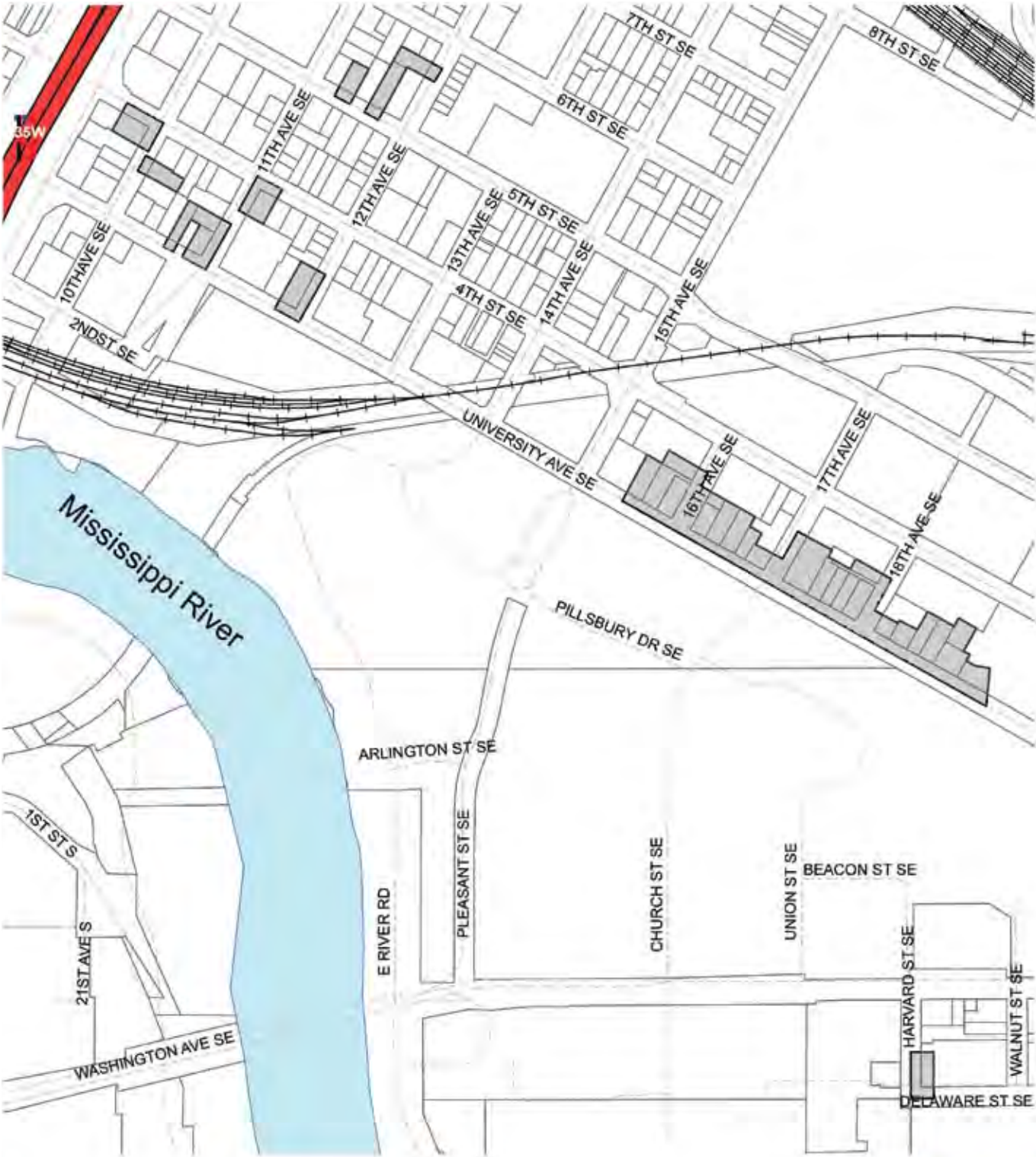
- Minneapolis Heritage Preservation Commission (MHPC)
- Minneapolis City Planning Division
- Minnesota State Historic Preservation Office

*These offices have responsibility for evaluating proposed alterations to existing properties and new construction.*

*Additionally, Minneapolis Zoning Code provisions are a required part of the approval process for Greek chapter house improvements.*



Appendix C – University of Minnesota Greek Letter Chapter House Historic District



## Appendix D – Room and Board Rate Comparisons

### Additional Information

The fact that campus area apartments, fraternities/sororities, and U of M housing provide different services/programs/amenities; require different contract/lease terms; and do not bill students for room & board charges in the same manner, means it's challenging to obtain a true "apples to apples" comparison. However, in an effort to provide a more comparable rate analysis, semester rates charged by the University and by sororities/fraternities were converted to a monthly rate. The information below highlights some of the unique differences between University housing, Sorority/Fraternity housing, and Campus Area apartments.

### University of Minnesota Room & Board Rates

- All U of M residence halls (8) and apartments (3) are included in the rate comparison analysis.
- Students living in on-campus residence halls sign an academic year contract.
- Students living in on-campus apartments sign a 9.5 month contract or an 11.5 month contract.
- U of M residence hall/apartment rates include all utilities, internet service, cable television, local telephone service, and free laundry.
- All U of M residence halls/apartments provide the following staff/services in each residence hall/apartment:
  - Live-in professional staff (Residence Director in each facility, and Assistant Residence Directors in the 6 large residence halls).
  - Community Advisors (student staff who provide support and assistance to students).
  - Intentionally designed programs that focus on community involvement and student development outcomes.
  - Numerous first-year student Living Learning communities.
  - Leadership development opportunities.
  - 24/7 Information Desks.
  - Night Security Monitors (11:00 p.m.- 7:00 a.m. – 7 days per week).
  - Custodial staff (responsible for the daily cleaning of bathrooms, corridors, stairwells and community spaces located within the building).
- U of M residence hall rates also include all direct and indirect expenses associated with operating the facilities, including depreciation (fully funded) and general repairs and maintenance.
- Students living in U of M residence halls/apartments will be released from their housing contract if they withdraw from the University or if they participate in a University Study Abroad program. Students may also be released from their contract for documented medical situations and for documented financial hardship situations that did not exist prior to the time that the student moved into his/her residence hall/apartment.
- When students are assigned to an expanded housing space at the beginning of an academic year, Housing & Residential Life may make the decision to release students from their housing contract for any reason. This process is typically implemented within the first two weeks of fall semester and will typically continue for one to two months. This process enables HRL to relocate students living in an expanded housing space to a permanent room/apartment assignment.
- All students living in a U of M residence hall are required to purchase a meal plan. Students may select from 6 meal plans. The most popular meal plan selected by students is the 14 meals per week plan. Students are allowed to change their meal plan during the first 2 weeks of each semester.

## Appendix D – *continued*

### Sorority/Fraternity Room & Board Rates

- 20 Fraternities and 8 Sororities are included in the rate comparison analysis (all located on the Mpls campus).
- Sorority/Fraternity room rate information was provided by the Fraternity Purchasing Association (FPA) for the 2011-12 academic year. Rates include all utilities including internet/cable television (if provided).
- Sorority/Fraternity rates also include parlor/house dues, chapter dues, social fees and building fund fees. It should be noted that not all sororities/fraternities include all of the charges noted above. See breakdown below:
  - Two fraternities charge parlor/house dues.
  - Seventeen fraternities charge chapter dues.
  - Five fraternities charge social fees.
  - Six fraternities charge building fund fees.
  - Four sororities charge parlor/house dues.
  - Eight sororities charge chapter dues.
  - None of the sororities charge social fees.
  - Eight sororities charge building fund fees.
- All sororities provide/require a board plan. However, only four sororities break out the actual cost of the board plan. For the purpose of the rate comparison analysis, an average board plan cost of \$1,000 was used for the four sororities that did not provide a board cost (this amount was deducted from the total semester room & board rate in order to obtain a room rate and board rate that is comparable to those chapters that included a separate board cost).
- Eight fraternities provide/require a board plan. However, the cost for board plans varies significantly from chapter to chapter – from a high of \$1040 per semester to a low of \$100 per semester.
- All sororities provide/require a live-in adult presence in their chapter house; some fraternities also provide an adult live-in presence in their chapter house.

### Campus Area Apartment Rates

- A sampling of 19 large student housing apartment complexes in close proximity to the University are included in the rate comparison analysis.
- Most campus area apartments included in the rate comparison study require 12 month leases. Students living in these apartment complexes are not typically allowed to cancel/terminate their lease. However, many will allow students to sublet their lease if they are studying abroad and possibly for other reasons.
- Most campus area apartments include water, trash, cable television and internet service in the student's monthly rental rate. Six of nineteen apartment complexes sampled include all utilities; and most include fully or partially furnished apartments. Some include washers/dryers in individual apartments; others provide laundry facilities within each apartment unit or provide shared laundry facilities in a common area/s within the apartment complex.
- A few of the campus area apartments have student staff positions similar to the University's Community Advisor position.
- None of the campus apartments provide a board plan.

Appendix E – Housing and Residential Life Business/Finance Model

Housing & Residential Life (HRL) is a self-supporting Auxiliary business enterprise. HRL provides single student housing in eight residence halls and three apartments; family student housing in two housing cooperatives; and faculty/staff housing in a 48-unit townhome complex. Revenue from traditional residence hall room rates and single student apartment rates fund all expenses associated single student housing. Meal plans are mandatory for all traditional residence hall residents and are optional for apartment residents.

Student Services & Programs included in HRL’s operating budget for single student housing include:

- Live In Professional Staff (Residence Directors/ Assistant Residence Directors);
- Community Advisors (student staff who provide support and assistance to students);
- Living Learning Communities for first-year students;
- Intentionally designed educational and social programs that focus on student development learning outcomes and community building;
- 24/7 Information Desk Operations in all residence Halls and apartments;
- Security Monitors on duty 7 days a week (11:00pm to 7:00am) in all residence halls and apartments;
- All utilities, cable TV, internet service – wireless and ethernet, telephone service, and laundry;
- Furnished residence hall rooms and apartments; and
- Community lounges, recreation rooms, computer labs, study rooms, and music practice rooms.

In addition to funding the programs and services noted above, HRL also funds facilities costs for long-term improvements and on-going annual maintenance/repair costs in all residence halls and apartments, including residential dining facilities. HRL fully funds depreciation which is used to pay for all capital projects, renewals & replacements, and furnishings/equipment in the residence halls, apartments and residential dining facilities. HRL transfers operating funds derived from depreciation into HRL reserve accounts which fund the capitalized projects and equipment replacements. In addition, any operating budget windfalls such as utilities savings due to warm winter temperatures are transferred to the reserve accounts to provide additional funds for renewals and replacements. Construction of new facilities or additions to existing buildings is financed by University issued bond debt, with the principal and interest paid for by HRL through room rate revenue.

HRL prepares a Ten Year Capital Plan which itemizes the capital projects, renewals & replacements and equipment purchases on an annual basis. Utilizing current depreciation and projected depreciation from the Ten Year Plan a five year cash flow projection is prepared to balance planned capital expenditures with available funding.

HRL’s Annual Operation Budget includes the following:

<i>Income</i>	
Residence Hall Room Rates.....	74.1%
Summer Conference Sales .....	4.4%
Single Student Apartments .....	20.5%
Miscellaneous Income .....	1.0%
	100.0%
<i>Expenses</i>	
Payroll & Fringe Benefits .....	30.0%
Depreciation .....	20.8%
Utilities.....	15.3%
Debt Service.....	12.9%
Repairs & Maintenance.....	8.7%
Cable TV, Telephone, Ethernet .....	7.4%
Facilities Lease.....	5.3%
University Overhead (ASU) .....	4.3%
Miscellaneous Expenses .....	4.1%
Insurance.....	1.2%
HRL Technology Support.....	1.1%
Res Dining Expense Reimb.....	-11.1%
	100.0%



## Appendix F – A University Steps Up



# A University Steps Up

## UNIVERSITY OF ALABAMA

At a time when many colleges and universities are distancing themselves from Greek organizations, the University of Alabama is following a different playbook by embracing Greek life and supporting Greek housing construction and improvements on campus.

Under the leadership of former University President Robert Witt, who wanted to expand the school's presence, prestige and enrollment, Alabama invested heavily in facilities and services. Understanding that prospective students decide if they can see themselves "fitting in" within minutes of their arrival, the university didn't waste time getting ahead of the curve.

Attracting and matriculating high-performing students worked in conjunction with the school's effort to re-engage Greek alumni in the current experience on campus. "Greeks were used as part of the student recruitment effort," said John Murdock, president of Greek resource services in Tuscaloosa. Fraternity and sorority membership has more than doubled in the past decade with more than 6,000 current students involved. At the same time, the All-Fraternity GPA rose from a 2.36 to 2.82.

### INVESTING IN GREEK LIFE

Many of the existing chapter houses were in need of serious renovations. They were not competitive with university upgrades and private housing developments adjacent to campus. Instead of allowing the situation to deteriorate, the university invested in Greek Life. "We view fraternity and sorority housing as an extension of our residential community," said Dana Keith, the university's associate vice president of finance. "We want our students to live in safe and healthy environments."



Extraneous expansion of sorority housing on the University of Alabama campus in Tuscaloosa, as of August 13, 2012.



## Appendix F – continued



The Phi Beta Kappa House, Beta Chapter, and the Delta Sigma Theta House, Alpha Chapter, at the University of Alabama.

According to Murdock, more than \$178 million has been invested in Greek-related projects. Beta was one of the first organizations to take advantage of the university's support to build its brand new \$4 million home.

### IF YOU BUILD IT . . .

Founded in 1965, Delta Theta is one of the youngest chapters at Alabama. With close to 150 brothers currently in school, the chapter is excelling. House Corporation President Bark Boardman '79, commented, "Our philosophy [in taking on risk of investing in the new house] was 'if you build it, they will come.'" Boardman expressed the house corporation's commitment to ensuring the chapter had an outstanding residence if they began achieving their potential.

Keith said, "We encouraged house corporations to develop business plans that allowed them to financially support housing projects." Construction was funded through a combination of alumni gifts and low-interest financing. After a collaborative effort, the Alabama Beta's were able to build their new house.

In a prime location, directly across from Bryant-Denny Stadium, the new house features ample study space, the latest technology, fire suppression, security systems and a meal program. With 35 bedrooms, the house more than quadruples the number of rooms in the former house.

Boardman shared how inspiring it is overlooking the "Walk of Champions" on game day, when fans line up to cheer on the Crimson Tide as they parade into the

stadium. "On game day, anywhere from 200-300 brothers, alumni and guests partake in festivities at the house prior to kick-off.

Once others saw Beta's success, they followed suit. "We were the first to build a new structure and many other groups are now either renovating or knocking down and rebuilding," added Boardman.

### A COLLABORATIVE EFFORT

"Although we know that a house doesn't make a chapter, in this case it was the perfect storm," Murdock said. "The football team was taking off again, the Betas had a brand new house across the street, enrollment was increasing and Beta's membership soared."

"The new facilities are not what you'd imagine in a typical fraternity house. It's a nice place. Upperclassmen want to stay in the house and house occupancy is nearly 100 percent," said Murdock. "This has been a huge team effort. The university wants Greeks to succeed. Alumni are energized again. There's no animosity between the students and the university. Everyone seems to be on the same page."

"The university went out on a limb and good alumni helped the chapter perform at a higher level," said Gentry McCreary, former director of Greek affairs. "There's no question the house has impacted the quality of the chapter as well."

"We wouldn't have built it if we didn't believe they'd be successful. And they proved us right," Boardman proudly declared.

Many of the existing chapter houses were in need of serious renovations . . . **Instead of allowing the situation to deteriorate, the university invested in Greek life.**



REG. ROOM  
1221 SF

**Roll Tide!**  
Investing in Greek Life at 'Bama

**6,000 current students**

Fraternity and sorority membership has more than doubled in the past decade.

**2.36 to 2.82**

Change in the All-Fraternity GPA in the past decade

**\$178 million+**  
Invested in Greek-related projects by the university

**\$4 million**

The cost of Beta's new chapter house. Beta was one of the first organizations to take advantage of university support.

## Appendix G – 17th Avenue Residence Hall Issues

### General Issues

- Recruitment of occupants of the two Chapter house facilities
- Final use and configuration of the third Greek space
- Recruitment of existing and new Greek organizations to contract for beds in the facility
- Development of appropriate contract provisions

### Storefront Spaces

- Is the Lessee an undergraduate chapter, house corporation, or national Greek organization?  
Pros and cons from standpoint of
  - University
  - Greek organization
- Options for lease terms
  - Length of lease term
  - Pricing (single year and multi-year),
  - Accommodation and enforcement of University rules
- Furnishings
  - Co-selected by University and lessee
  - Financed by University and amortized over a few years
  - Potential excess wear and tear covered with deposit

### Sleeping Accommodations

- Preference in locations for space blocks
- Customization options and constraints
- Individual contracts vs. chapter commitments
- Contracting entity
- Pricing of multi-year commitments vs. single year.